

**Department of Management Studies
University of Surrey**



**Towards the improvement of the efficiency and effectiveness of
tourism planning and development at the regional level:
planning, organisations and networks.
The case of Portugal**

A thesis submitted in fulfillment of the requirements for the
Award of PhD Degree

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*To my wife, Graça, my son, Sebastião
and my parents, Sara and Armando*

Summary

Despite being one of the world's leading industries and one of the most important economic sectors in many countries, tourism has flourished more on the basis of spontaneity than as a product of planned actions. The objective of this thesis is to examine whether there is a case for tourism planning and the way it should be carried out in the future.

As tourism planning is a specialisation of urban and regional planning, the first part of the thesis sets out to examine the links between the two disciplines, the way they evolved in the past, and how their efficacy can be improved in the future. However, one of the central arguments offered is that the improvement of tourism planning cannot be seen only in terms of the planning process, since, although consistently neglected, its success depends on the organisational framework in which it is carried out. Bearing that in mind, an insight is provided into the hierarchical and bureaucratic styles which dominate the operation of most organisations to show that they are no longer suited to today's reality. The transition from the welfare state towards neo-liberalism is outlined with the objective of demonstrating that nowadays successful forms of organisation and effective styles of planning demand horizontality, flexibility, cooperation, empowerment and greater emphasis on regional level administrations. Within this context it is shown that 'networks' contain enormous potential to redesign, readjust and relaunch the way in which organisations operate and the tourism planning activity is carried out.

The methodology utilized includes a multiplicity of methods ranging from descriptive statistics to sociometric analysis. Although emphasizing the case of Portugal the examples, discussion and findings are based on worldwide trends and, therefore, the recommendations are applicable to other countries.

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List of abbreviations

- ADC - Association of District Council (Britain)
- BA - British Airways
- BT - British Telecom
- BTA - British Tourism Authority
- DL - Decree Law (Portugal)
- DTI - Department of Trade and Industry (Britain)
- EAGGF - European Agriculture Guarantee and Guidance Fund
- EEC - European Economic Community
- EC - European Community
- EFTA - Economic Free Trade Area
- EIA - Environmental Impact Assessment
- EIB - European Investment Bank
- EIP - Exchange of information with the public
- EIU - Economist Intelligence Unit
- ERDF - European Regional Development Fund
- ERM - European Rate Mechanism
- ETB - English Tourism Board
- EU - European Union
- GATT - General Agreement on Trade and Tariffs
- GIS - Geographic information systems
- High-Tc - high technology industries
- INE - National Institute for Statistics (Portugal)
- MERCOSUL - Economic market set up by several South American countries
- MCT - Ministry of Commerce and Tourism (now Ministry of Industry Commerce and Tourism) (Portugal)
- n.a - data not available
- NAFTA - Economic market involving the USA, Canada and Mexico

NHS - National Health Service (Britain)
NTA - National Tourism Administration
NTO - National Tourism Organisation
OECD - Organisation for Economic Cooperation and Development
PASOLP - Product's Analysis Sequence for Outdoor Leisure Planning
PDR - Regional Development Plan (Portugal)
PNT - Portuguese National Tourism Plan (Plano Nacional de Turismo)
PTE - Portuguese Escudo
Quangos - Quasi-Autonomous Non-Governmental Organisations (Britain)
R&D - Research and Development
RPG - Regional Planning Guidance (Britain)
RTB - Regional tourism board
SET - Secretary of State for Tourism (Portugal)
SPP - Sociedade de Propaganda de Portugal (Portugal)
s/y - several years
TDP - Tourism Development Programme (Britain)
TEC - Training and Enterprise Councils (Britain)
TGV - High Speed Train (Train Grand Vitesse)
TLC - Tourism Leisure Committee (Britain)
USA - United States of America
UK - United Kingdom
WTO - World Tourism Organisation

Chapter 1

The concepts of leisure, recreation, tourism and planning

1.1 Introduction

In a thesis where leisure, recreation, tourism and planning assume centre stage it is important to discuss what they mean and raise some of the most important issues associated with them. This is what this chapter will attempt to do. In particular, leisure, recreation and tourism may be classified as a group of activities carried out by individuals during their free time. In other words, they are linked to needs of relaxation, enjoyment, pleasure, and self-enhancement, and also that they tend to oppose other needs that absorb most of the individual's life, such as existence needs (e.g., eating, sleeping, body-care, etc) and subsistence needs (e.g., work and other work related activities).

The planning concept is introduced in parallel with the leisure, recreation and tourism concepts because, as will be further expanded in chapter 2, since growing numbers of people have become engaged in the leisure market, most places are unable to cope with additional demand. Planning will then be seen here as, generally speaking, an activity the aim of which is threefold: (1) help the visitors to adjust to the local communities, by making their stay more pleasurable, safer and rewarding; (2) to create conditions which will prevent the development of social, environmental and economic disruptions; (3) to create conditions which will allow a maximization of the benefits (economic, environmental and social) resulting from the visitors' stay.

1.2 The concept of leisure

The concept of leisure, whose roots may be traced in the Latin word *licere* which means 'to be free' (Jensen, 1977; pp. 5-6; Torkildsen, 1992; p.25), and in the French, also Latin based, word *loisir* which, generally speaking, means 'to be permitted' (Jensen, 1977; pp.5-6; Meyer and Brightbill, 1964; p.27; Torkildsen, 1992; p.25), is the subject of controversy, as there is no consensus on its definition and boundaries. Most of the controversy surrounding this concept is due to the scientific background of the academics that research into this matter. Authors belonging to the fields of psychology and psychiatry argue that leisure should be viewed in a 'holistic perspective'. According to them, leisure is more an attitude than an activity, because it may occur in almost all situations. In other words, leisure is a 'state of mind' or a 'spiritual attitude'.

In particular, this group of academics argue that *leisure is not simply the result of external factors, it is not the inevitable result of spare time, a holiday, a week-end, or a vacation* (Pieper, 1963; p.40), because *the leisure state or experience resides in the individual, not in the activity. This experience involves a constellation of cognitive processes and affective sensations that vary from individual to individual* (Tinsley and Tinsley, 1982; in Graefe and Parker, 1987; p.15). Therefore they suggest that leisure should not be viewed as a 'block of time' related to 'holidays', or 'out-of-working' time. Instead, *it may occur in differentiated situations, such as in the shower or at work, while writing a poem or driving a car or planting flowers in the garden* (Csikszentmihalyi, 1975; in Graefe and Parker, 1987; p.14/5), because leisure is a state of mind which is achieved whenever a person is in optimal interaction with the environment (Csikszentmihalyi, 1975; in Graefe and Parker, 1987; p.14/5).

According to this group of academics the conditions for the emergence of leisure attitudes are as follows (Tinsley and Tinsley, 1982, and Csikszentmihalyi, 1975; in Graefe and Parker, 1987; p.14/5): (i) absorption or concentration on the ongoing experience; (ii) lessening of focus on self; (iii) feelings of freedom or lack of constraint; (iv) enriched perception of objects and events; (v) increased intensity of emotions; (vi) increased sensitivity of feelings; (vii) decreased awareness of the passage of time. In addition they claim that there are four essential conditions for individuals to perceive leisure: (i) that the individuals perceive freedom to choose an activity is personal rather than a result of external coercion; (ii) that they engage in an activity to obtain benefits inherent in that pursuit; (iii) that the individual experiences an optimal level of arousal; and (iv) that the individual is committed to fulfilling his or her potential through that activity.

Scholars backing the holistic perspective base some of their viewpoints on Aristotle's classical definition of leisure, who defined leisure as 'relaxation from an occupation', a 'mood of

contemplation'. In other words, leisure may be defined as an 'adjective' meaning unhurried, tranquil, or without regard to time (Neulinger, 1984; p.4), and, therefore, may happen at any time and in almost all situations.

Although not disagreeing with the arguments supporting the holistic perspective, a second group of scholars, that might be grouped in the 'Organic Perspective', see leisure rather as a block of out-of-working time, as spare, surplus or free time than as an attitude (Bolgov and Kalkei, 1974; p.1; Haun, 1967; p.39-40; Charter of Leisure, 1972; p.16; Neumeyer and Neumeyer, 1958; Brightbill, 1961; Boniface and Cooper, 1994; p. 1). Academics supporting the organic perspective tend to do it on the basis of the following two main reasons.

First, even if there is general agreement that the leisure concept is complex and thus difficult to define, *most of the population consider leisure as ... uncommitted or off-the-job hours* (Jensen, 1977; pp.5-6). Such a statement is supported by 'common' definitions about leisure, such as that provided by the Oxford Study Dictionary (1991; p.392), where leisure is defined as *time that it is free from work, time in which one can do as one chooses*.

Second, in opposition to work, leisure is viewed as arising from *the complex of self-fulfilling and self-enriching values achieved by the individual as he or she uses leisure time in self-chosen activities that recreate him* (Jensen, 1977; p.5/6). That is, leisure activities are viewed as carried out according to a purpose or a goal (English, 1967; p.105-111) of self-enhancement and, therefore, they implicitly mean freedom from compulsory activities. In other words, leisure implies a block of out-of-working time which is incompatible with essential activities. Therefore, work is viewed as an *antonym of free-time, and (those) live into different worlds* (de Grazia, 1962; p.233). In addition, the 'leisure activities' that take place during working time, as suggested in the holistic perspective, are viewed in the organic perspective as escapism: an escape from the realities of life by absorbing the mind in entertainment or fantasy but not necessarily leading to the individuals' physical involvement in any activity.

Neither questioning nor denying the validity of the arguments which support the holistic perspective, leisure will, however, be viewed in this report in an organic perspective, for two main reasons. To begin with, the organic perspective affords the distinction of work from leisure, by considering that the leisure activities that take place during working time are residual compared to work. That is, such activities may be viewed as escapism and not properly as leisure. Therefore, work and leisure may be clustered into two independent groups of activities.

Furthermore, adopting of the organic perspective allows researchers to focus their analysis on the paramount phenomenon by not attributing relevance to 'noisy variables'. Such a procedure

is also based on the way in which other sciences are viewed. That is, although not denying the fact that most phenomena in the world are interconnected, academics place them into different groups, such as chemistry, physics, biology, sociology, anthropology, etc.

It is in fact the organic perspective that has attracted the attention of the vast majority of researchers working in the leisure field, and not the holistic perspective (Jensen, 1977, pp. 5-6). Evidence for this is brought about by a report published by the WTO concerning the 'Development of Leisure Time and the Right to Holidays' (WTO, 1983). It is argued in the report that even if some activities overlap each other, in a holistic concept of the world, and, therefore, some biological needs such as eating is also *linked to time for tourism and holidays ... (and) it can then be an important motivating factor, as in the case of gastronomic tourism* (WTO, 1983; p.13), human activities may, for scientific reasons, be grouped into mutually independent groups, as illustrated by table 1.1. Thus, leisure may then be viewed as a block of non working time or free time used by individuals in both rest (idleness) or in play and recreational activities.

Table 1.1 - How time is spent in the individual's life (existence, subsistence and leisure time)

Type of Time	How time is spent
I. Existence (43%) Time devoted to satisfy physiological needs	. <i>Eat</i> . <i>Sleep</i> . <i>Bodily care</i>
II. Subsistence (34%) Time devoted to remunerated activities	. <i>Work</i>
III. Leisure (23%) Disposable time after existence and subsistence needs are fulfilled	. <i>Play-recreation</i> . <i>Rest</i> . <i>Family and social obligations</i> (obligated time)

Adapted from: WTO (1983; p.12-14)

Meyer and Brightbill (1964; p.27)

1.3 The concept of recreation

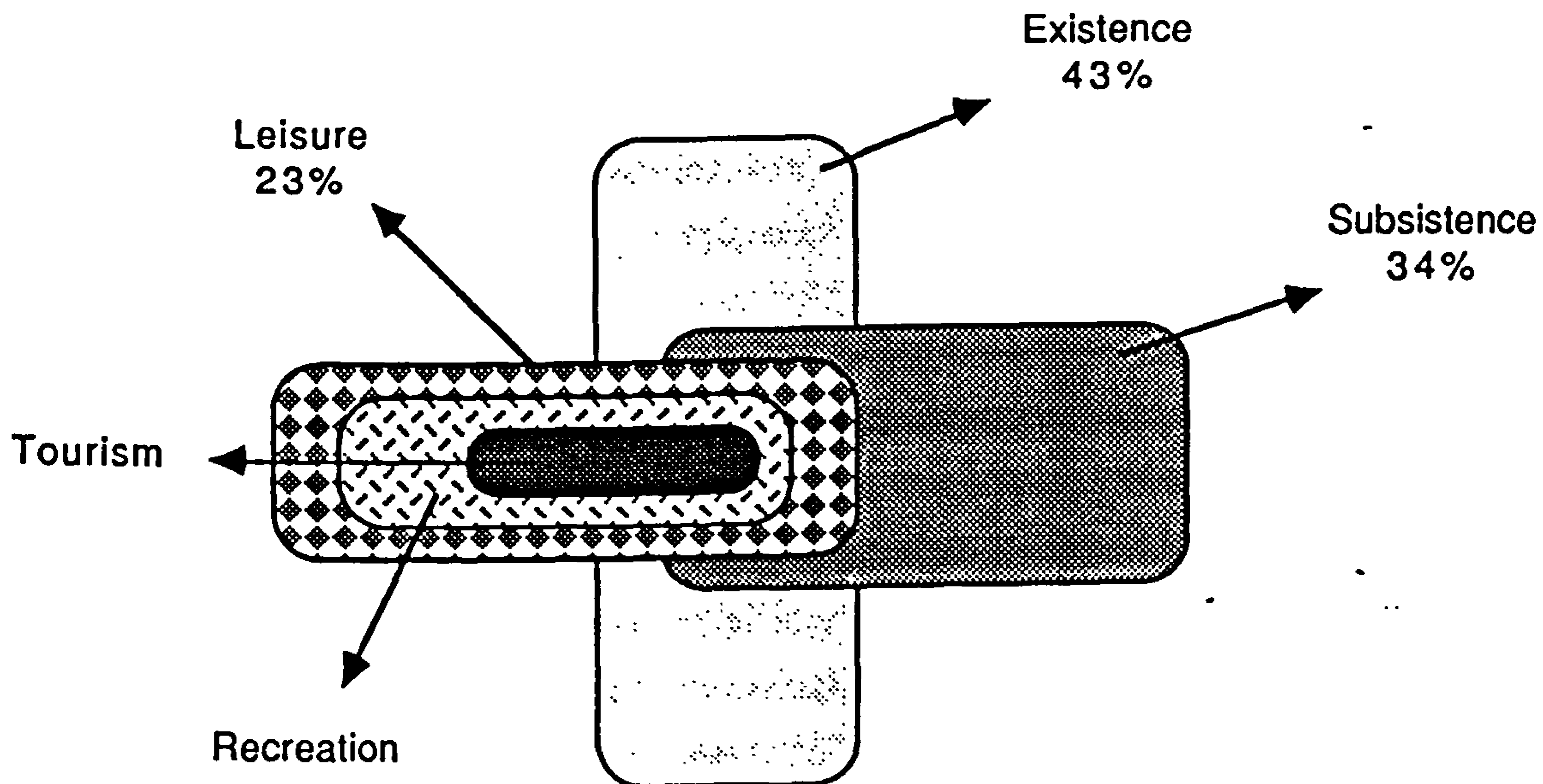
Having discussed the meaning given to the leisure concept in this report, the concept of recreation will be examined. The sense of recreation was initially linked to the concept of 'play'. The term *play* finds its roots in the Anglo-Saxon words *plegian* and *plegan* and in the German word *pflügen*, which mean 'to play' and 'to take care of'. Both words are associated with happiness, amusement, and relaxation from work (Meyer and Brightbill, 1964; p.28). Although the word 'play' also finds its way in the vocabulary of adults, the notion of play has been mainly associated with spontaneous diversion of children or small animals (Torkildsen, 1992; pp.46-8; Meyer and Brightbill, 1964; p.28). Therefore, during recent decades the word play has been used more for children's activities, or, alternatively, for activities undertaken by adults which follow a set of package rules, such as football, music, cards, etc. Instead of the word 'play', the term 'recreation' (from the Latin word *recreare*) is nowadays more utilised in literature, even when they are considered almost as synonymous (Meyer and Brightbill, 1964; p.28).

According to Jensen (1977; p.7-8) the word recreation started to be used in the US textbooks in the 1930s and 1940s, and was defined as *a form of human activity that needed no other purpose, and was engaged in primarily for its own sake*. The idea was that *play and recreation were activities carried on during free time, voluntarily chosen, pleasurable, and not concerned with meeting economic or social goals*. However, this notion rapidly became obsolete as public and private sector agencies started to play a role in a number of recreational activities. The public sector was mainly concerned with its coordination, regulation and education; the private sector with seeking to make a profit from the operation of facilities.

A parallel to the leisure concept controversy may also be found in the way in which the recreation concept is viewed and defined. Whilst some academics argue that recreation is a 'process of involvement', others argue, instead, that recreation is a 'result' or 'outcome'. Such a discussion is based on the same assumptions introduced in the above section (section 1.2), when the leisure concept was discussed. Therefore the same issues are not to be discussed again because that would be redundant. However, for an expanded analysis of this subject the following useful references may be cited: Jensen, 1977; Kraus and Bates, 1975; Neumeyer and Neumeyer, 1958; Butler, 1976; Gray, 1972; Gray and Grebben, 1974; Torkildsen, 1992.

From an organic perspective recreation may be defined as free or discretionary time spent on a variety of activities undertaken during leisure time. Even if 'leisure' and 'recreation' are often considered as synonymous, because conceptually they are linked (Jensen, 1977; p.5-6), the former is a more embracing term which includes self-imposed inactivity whereas the later

Figure 1.1 - Leisure, recreation and tourism



presupposes some activity and motivation designed to enhance self-expression and self-esteem (Seabrooke and Miles, 1993; p.2; Meyer and Brightbill, 1964; p.32).

Taking into account the time spent and the distance travelled in recreational activities, Boniface and Cooper (1994; p.2) offer a way in which recreation may be split into several groups. According to them, one may consider recreation as 'home-based recreation' if it implies activities within the house boundary, such as reading, gardening, socializing, etc; 'daily leisure' if it is oriented towards activities, such as visiting theatres or restaurants, sports (participating or as a spectator), and socializing; 'day trips' if there is a 'planned' movement for visiting or developing some activities, such as visiting attractions and picnicking; finally, and on the extreme of this range of possibilities is 'tourism', which may broadly be defined as a form of leisure that necessarily implies overnight stay at the visited place, and also that the place visited cannot be the usual place of residence (for an expanded discussion of the concept of tourism see section 1.4).

Based then on the previous discussion, the concepts of leisure, recreation and tourism may be schematically represented as shown by figure 1.1. In particular figure 1.1 attempts to draw attention to the following. Firstly, that the concepts of leisure, recreation and tourism may be addressed from a holistic perspective, by taking into account that leisure activities occurring during work time are residual ('escapism'). In second place, although considering that leisure, subsistence and existence times may be split into different spheres, the chart does not deny that

these three concepts are interrelated. That is, the chart attempts to show that leisure cannot occur before the fulfillment of the subsistence and existence needs.

As will be seen further (see section 2.2.2) this chart will also allow to understand the enabling conditions that prompted the tourism explosion of the 1960s, as well as some models widely quoted in literature drawing attention to this phenomenon (see in particular Vecchio - figure 2.1).

1.4 The concept of tourism

It is not only the leisure and recreation concepts that lack universal definition. As will be discussed in this section strong controversy may also be noticed in the way in which the tourism concept is defined. To a large extent such controversy is linked to the changes operated in tourism over the last decades (see chapter 2) as well as to the difficulty in identifying both what tourism is all about and where the tourism sector begins and ends, i.e. its boundaries.

Authors such as Murphy (1985; p.3-16), Burkart and Medlik (1981; pp.41-49), Middleton (1988; pp.3-11), and Holloway (1989; pp.9-21) provide material for useful insights into the discussion of the scope, nature and evolution of the tourism concept. In addition to them, a report published by the IUOTO (1972; pp.1-6) (now World Tourism Organisation) provides an expanded analysis of the way in which the tourism concept evolved from the League of Nations in 1937 up to 1972. This report exhaustibly analyses the outcomes emerged from the following meetings, which are viewed as critical to the way in which the tourism concept is seen at present:

- (i) The Committee of Statistical Experts of the League of Nations, 1937.
- (ii) The IUOTO meetings held in Dublin, 1950, and London, 1957.
- (iii) The United Nations Statistical Commission, 1953.
- (iv) The United Nations Convention concerning Customs Facilities for Touring, 1954.
- (v) The United Nations Conference on International Travel and Tourism held in Rome 1963.
- (vi) The United Nations Statistical Commission - Expert Group on International Travel Statistics, 1967.
- (vii) The United Nations Statistical Commission, 1968.
- (viii) The United Nations Guidelines for Tourism Statistics, 1971.
- (ix) The United Nations Conference on Trade and Development, Third Session, 1972.

Because it is not the aim of this thesis to provide an expanded analysis of the way in which the tourism concept has evolved over the last decades but, instead, to highlight how tourism is

nowadays viewed among scholars and practitioners and also to outline some of the most common problems linked to its boundaries (because this influences the way in which the fieldwork, reported in chapters 7 and 8, was conducted in Portugal), details which are not relevant to this discussion will be consciously left out (for an expanded analysis see IUOTO, 1972).

The first definition of tourism, based on the definition of tourist, may be traced in the findings outcome from the Committee of Statistical Experts of the League of Nations. This Committee suggested to the Council on the 22nd January 1937 a definition for tourism, to secure the standardisation of international tourism statistics. According to the Committee, a 'tourist' should be defined as *any person travelling for a period of twenty-four hours or more in a country other than that in which he usually resides* (IUOTO, 1972; p.1). Accordingly, the Committee agreed that the following groups of travellers should be regarded as tourists (IUOTO, 1972; p.1):

- (i) Persons travelling for pleasure, for domestic reasons, for health, etc.
- (ii) Persons travelling to meetings, or in a representative capacity of any kind (scientific, administrative, diplomatic, religious, athletic, etc.).
- (iii) Persons travelling for business purposes.
- (iv) Persons arriving in the course of a sea cruise, even when they stay less than twenty-four hours. The latter should be reckoned as a separate group, disregarding if necessary their usual place of residence.

The Committee also agreed that the following group of travellers should not be viewed as tourists:

- (i) Persons arriving, with or without a contract, to take up an occupation or engage in any business activity in the country.
- (ii) Other persons coming to establish residence in the country.
- (iii) Students and young persons in boarding establishments or schools.
- (iv) Residents in a frontier zone and persons domiciled in one country and working in an adjoining country.
- (v) Travellers passing through a country without stopping even if the journey takes more than twenty-four hours.

Holloway (1989; p.9) points out that the main weakness noticed in this definition was the fact that domestic tourism was left out. Such a situation assumes particular importance when it is argued in literature that, although permanently forgotten by scholars and against many myths, domestic tourism is the most important form of tourism worldwide (Cooper et al, 1993; p.1). Nonetheless, this thesis will also show later that in some Mediterranean countries, such as

Portugal, that may not be viewed that simply, since, from an economic point of view, international tourism (see sections 5.3.2.1 and 5.3.2.4) is more important than domestic tourism (see section 5.3.2.2).

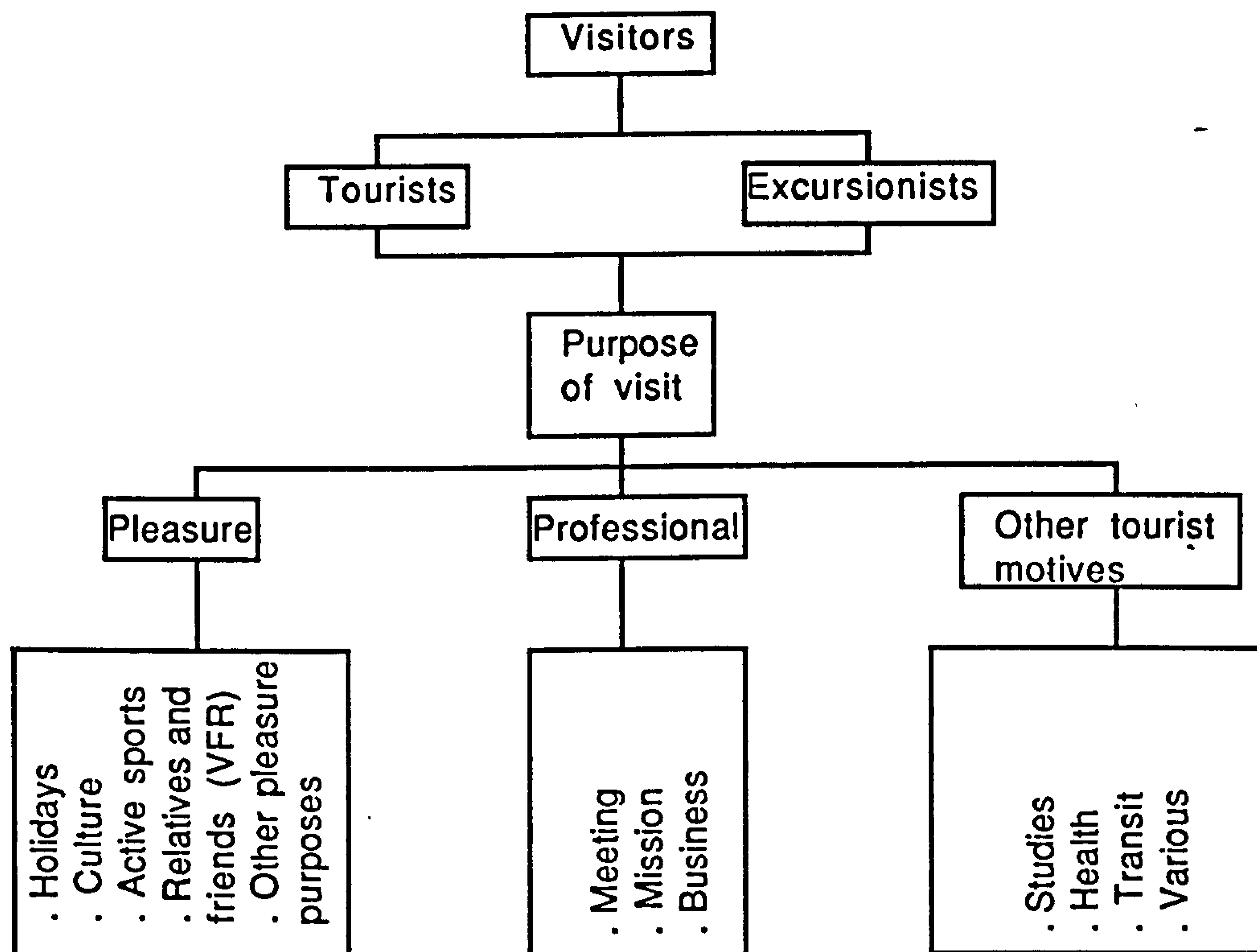
Trying to overcome the weaknesses linked to this definition, the United Conference on International Travel and Tourism held in Rome in 1963 suggested a group of new definitions for tourism. Such definitions were put forward by taking into account some of the outcomes produced from the meetings held in Dublin, 1950, and London, 1957, and the findings which emerged from the United Nations Statistical Commission meeting in 1953. For the first time the following definitions for the concepts of 'visitor', 'tourist' and 'excursionist' were agreed (IUOTO, 1963; p.3). 'Visitor' should be seen as *any person visiting a country other than that in which he (she) has his (her) usual place of residence, for any reason other than following an occupation remunerated from within the country visited*. 'Tourists' were those temporary visitors staying at least twenty-four hours in the country visited and whose purpose of journey fell under one of the following headings: (i) leisure (recreation, holiday, health, study, religion and sport); (ii) business, family, mission, meeting. 'Excursionists' were those visitors staying less than twenty-four hours in the country visited, including travellers on cruises but excluding travellers in transit.

Despite the evolution noticed in relation to former definitions, these concepts were, nevertheless, considered too narrow, since domestic tourism was, again, not taken into account by the new definitions. Therefore new concepts started to be put forward. For instance, the International Conference on Leisure, Recreation and Tourism organised by the AIEST in Cardiff in 1981, suggested later the following definition: *tourism may be defined in terms of particular activities selected by choice and undertaken outside the home environment. Tourism may or may not involve overnight stays away from home*.

The main thoughts underpinning this definition have found reasonable acceptance among academics and, therefore, have been quoted or used as source of inspiration for similar definitions available in several tourism handbooks (see, for instance, Murphy, 1985; Burkart and Medlik, 1981; Middleton, 1988; Pearce, 1989).

As a result of the (tacit?) agreement on these definitions, the WTO decided officially to accept them, whilst introducing some slight changes into these concepts. Nowadays the official definitions followed by the WTO, which have not been the object of major changes since 1985, may be found in three reports published by the WTO. In particular a 1985 WTO report provides clear guidelines for the concepts of visitor, tourist and excursionist (WTO, 1985). In a 1988 WTO report similar definitions may also be found reporting the concepts agreed three years

Figure 1.2 - Schematic representation of the concepts of visitor, tourist and excursionist



Source: adapted from WTO (1988)

before (WTO, 1988) (these two references are particularly important to those dealing with the collection and analysis of tourism data). New recommendations and guidelines for these concepts are also found in another report published recently by the WTO (see WTO, 1994b).

Such definitions, which provide the framework for the statistics published in the 'Yearbook of Tourism Statistics' (see WTO, s/y), are as follows (see figure 1.2). To start with, the concept of 'visitor' should be used to describe any person travelling for less than a specified amount of time, to a place other than that of his usual environment, and the main purpose of whose visit is other than the exercise of an activity remunerated from within the place visited. In addition, the WTO suggests the division of visitors into international and national visitors respectively, whether the place visited is located outside or within the country borders of the individuals' usual place of residence (WTO, 1988; sections 2.2, 2.2.2 and 2.2.3).

In second place, the concept of 'tourist' should be used to describe any visitor staying at least one night in the country visited. Whether the country visited is the individuals' usual place of residence or not, tourists are respectively grouped into national or international tourists (WTO, 1988; sections 2.8, 2.8.1 and 2.8.2).

In third place, an 'excursionist' is described as any visitor who does not spend any night in the place or country visited. Again, the distinction between national or international excursionists falls under the principle mentioned before for the concepts of 'tourist' and 'visitor'. That is, whether the country visited is the individuals' usual place of residence or not, excursionists are respectively classified as national or international visitors (WTO, 1988; sections 2.9, 2.9.1 and 2.9.4).

Finally, the WTO also suggests to its member states that visitors should be categorized according to the purpose of their visit, that is the reason the visitor decides to take a trip, into the following groups: leisure and holidays (e.g., recreation, cultural events, active sports (non professional), other leisure and holidays purposes); business and professional (e.g., meetings, missions, incentive travel, business, other); other tourism purposes (e.g., studies, health treatment, transit, various) (WTO, 1988; section 5.2 and Annex B).

Among other achievements, these definitions have allowed most of the hot discussion of previous years about what the concepts of visitor, tourist and excursionist should be all about to settle down. In addition to that, they also allowed one of the outcomes produced by the Manila Conference, concerning the standardization of tourism statistics, to be answered. Indeed, the definitions introduced by the WTO have been followed worldwide, i.e. have become universal. Nowadays the international comparison of tourism statistics is no longer a big issue, even if there is room enough for further improvement, as is pointed out, among others, by Inskip (1991, p. 18) and Holloway (1989, p. 10-11). For instance, Holloway argues that the WTO official definition may include activities outside the tourism sphere such as *burglary or any of a hundred activities*, whereas other activities belonging to the tourism sphere are not addressed by the definition.

However, what is observed is the fact that the main problem among academics and practitioners is not linked to the definitions developed by the WTO for statistical purposes. The big issue within the tourism community is to clarify what tourism is all about and to find a suitable definition agreed by all in the community. That task has, however, proved very difficult to achieve. Holloway (1989, p.11) argues that *conceptually ... to define tourism precisely is a difficult if not impossible task. To produce a technical definition for statistical purposes is less problematic*. Cooper et al (1993; pp.4-5) also claim that *not surprisingly tourism ... (is) difficult to define*, attributing such problems to its immaturity as a field of study (see also Cooper et al, 1994).

In fact, there are a number of different definitions in literature attempting to define tourism. Among the most widely quoted one may point out those proposed by Murphy, Leiper, Smith, Jafari, and Mathieson and Wall.

For instance, Murphy (1985, p. 9) defines tourism as the *sum of (...) the travel of non-residents (tourists, including excursionists) to destination areas, as long as their sojourn does not become a permanent residence. It is a combination of recreation and tourism.* Not surprisingly, Murphy's definition emphasises that tourism must be viewed in terms of the relationships set up between 'hosts' and 'guests', because a good share of his book attempts to analyse the relationships set up between tourists and local communities. In this way, his definition may be viewed, using the title of his book, as 'a community approach'.

The emphasis put by Mathieson and Wall on their definition is different from Murphy's, because in their book they are particularly interested in the impact produced by tourism on destination areas. Hence, they define tourism as *the temporary movement of people to destinations outside the normal home and workplace, the activities undertaken during the stay and the facilities created to cater for the needs of tourists. The study of tourism is (then) the study of people away from their usual habitat, of the establishments which respond to the requirements of travellers, and of the impact that they have on the economic, physical and social well-being of their hosts* (Mathieson and Wall, 1982; p.1). Similar to Murphy, the emphasis is on the relationships set up between hosts and guests. However, Mathieson and Wall's definition clearly suggests that their thoughts are on the impact brought about by 'hostile' tourists into local communities.

The definition developed by Mathieson and Wall has similar features with the one put forward by Jafari. As Mathieson and Wall, Jafari also suggests that *tourism is the study of man away from his usual habitat, of the industry which responds to his needs, and of the impacts that both he and the industry have on the socio-cultural, economic and physical environment of the host* (Jafari, 1977, p. 6). Again, the emphasis is put on the impact produced by tourism on the destination areas.

In his definition Leiper attempts to define tourism from a systems approach, by pointing out the main elements involved in the tourism phenomenon. He points out that tourism may be seen as *the system involving the discretionary travel and temporary stay of persons away from their usual place of residence for one or more nights, excepting tours made for the primary purpose of earning remuneration from points enroute. The elements of the system are tourists, generating regions, transit regions, and a tourist industry. These five elements are arranged in spatial and functional connections. Having the characteristics of an open system, the*

organisation of five elements operates within the broader environments: physical, cultural, social, economic, political, technological with which it interacts (Leiper, 1979, pp. 403-404).

By reviewing some of the most quoted definitions available in literature and the discussion that they have prompted, Cooper et al (1993, pp. 4-5) claim that the problem of defining tourism is caused by conceptual deficiencies, since *they have been created to cater for particular needs and situations*. According to them most definitions lack scientific maturation and explicit strategic aims. Also commenting on this issue Smith (1989, p. 33) argues that *defining tourism in terms of the motivation or other characteristics of travellers would be like defining the health-care professions by describing a sick person*.

Smith (1988) argues that though the debate among academics is, for obvious reasons, important, what tourism needs at present is indeed more cohesion and consensus among its members. According to Smith, the diversity of definitions proposed by academics has caused disorientation among its members and contributed to the loss of credibility near governments. Opposing academics such as Leiper, he strongly claims that the move forward should be towards the recognition that tourism is an industry.

In accordance with this he proposes the following supply-side definition: *tourism is the aggregate of all businesses that directly or indirectly provide goods or services to facilitate business, pleasure, and leisure activities away from the home environment*. Applying this concept to Canada, he decided to split the tourism industry into two tiers. A tier 1 including commodities serving mainly tourists (e.g., airlines, hotels, some restaurants, etc). In other words, business that would cease to exist if there were no travel. A tier 2 including commodities serving tourism and other non-tourist activities (e.g., activities serving tourists and local residents such as motor vehicles dealers, restaurants, cab and bus operators, etc). The importance for tourism of the supply-side definition proposed by Smith may be seen from the fact that even the WTO decided to propose a supply-side definition later in 1994 (see WTO, 1994b).

The lack of consensus on an universal definition for tourism reached one of its peaks with the exchange of ideas, mixed with some accusations, between Smith and Leiper (see in particular Leiper, 1990 and Smith, 1988, 1991). Such a discussion, is, again, associated with the problem of identifying and defining what tourism is all about.

Most of the discussion, that still goes on, in the tourism community may be attributed to the complexity of the tourism sector. Indeed, tourism is based upon an amalgam of products and on an imbroglio of participants. The tourism sector involves both public and private sector

organisations, that tend to orient their strategies towards different, and often opposite, objectives.

Private sector organisations run facilities where profit can be made, such as transport, travel agencies, tour operators, accommodation, attractions, etc. Public sector organisations deal with matters usually identified as belonging to the 'public interest' field, such as roads, sewage plants, socio-cultural exhibitions with non-profit objectives, etc. It also attempts to coordinate and control private investments, to boost them and avoid conflicts between private sector interests and society. However, and as will be pointed out in chapters 5 and 7, it is difficult to draw a line between the role developed by these two main groups of actors (and, is that 'frontier' also desirable? - chapter 3 will provide a discussion documenting how this traditional way of approaching private and public sector organisations is becoming out of date), as well as to clearly say what should be their role and extent of intervention in tourism matters.

Another issue that makes the tourism sector different from the other traditional economic sectors is linked to the characteristics of its products. Tourism products are different from manufacturing goods because, for instance, they are not standard. Indeed, they depend on the physical, social and economic characteristics of each place (notion of 'uniqueness'). In addition to that, tourism products are intangible and, therefore, perishable. That is, they are services which are provided to consumers that cannot be stored. Furthermore, compared to manufacturing goods tourism products depend to a greater extent on uncontrolled variables such as political crisis, social disturbances, and fashion. A good example of this uncontrolled influences over the tourism sector is the case of the 1974 Portuguese revolution which was responsible for a significant decrease in tourist flows (see section 5.3.2.1).

Often, tourism products are consumed both by tourists and non-tourists. This is one of the reasons why Smith developed the what he calls the two-tier approach, with the aim of identifying which activities are providers of the tourism sector. Nevertheless, what he does not emphasise in his definition is the fact that the level of engagement of some organisations in the tourism sector varies from place to place, according to the level of tourism development in the area and to the characteristics of the products offered by the tourism industry.

In other words, this issue is slightly overshadowed by the definition proposed by Smith because he uses estimates instead of regional data. The empirical evidence brought from Portugal illustrates that whereas some organisations assume centre stage in a region, the same organisations may assume a peripheral role in other places, which also offers evidence to some of the assumptions supporting the model suggested by Miossec (Miossec, 1977). For instance, Miossec argues that as tourism develops the impact on fauna and flora is greater, the reason

why some public organisations (e.g., planning and environmental organisations) become more intensively engaged in the tourism sector at places characterized by higher levels of tourism development. In particular, sections 7.2.1, 7.3.1, 7.3.3 and 7.3.14 will bring empirical evidence to these claims, by pointing out how the tourism organisation is a variable which also depends on the stage of tourism development of each region.

The complexity of the tourism sector and the confusion existing amongst academics about what tourism is all about, have very much contributed to the fragmentation of its theory and practice. Indeed, despite it being commonplace to state that tourism will acquire the status of the most important economic sector by the turn of this millennium (tourism is already the world's third largest sector only behind crude petroleum products and motor vehicles, parts and accessories - see WTO, 1994a, p. 2), there is still no agreement as to what 'industry' is being talked about. At the time of writing this report, there is no universal definition of tourism and its boundaries are still very grey, because no one can say for sure where tourism begins and ends.

Not surprisingly, academics are deeply divided on all these matters. In a paper published in 1990 Jafari argues that it is impossible to identify a prominent school in tourism at present. What one might instead observe is a fragmentation of the tourism theory and practice polarized by four main streams: the 'advocacy platform'; the 'cautionary platform'; the 'adaptancy platform'; and the 'knowledge-based platform' (Jafari, 1990). Such 'schools' are distinctive from each other by the way in which they defend the theory regarding the important economic benefits attached to tourism or that tourism brings more costs than benefits; that tourism helps to enhance the natural systems or tourism disrupts them; that tourism must be viewed from a macro-scale, or small size developments are the way forward; etc.

As will be discussed further, the fragmentation of the tourism theory and practice and its lack of scientific maturation have greatly contributed to the negative impact brought about by tourism to a number of destinations areas and also for the disorientation and hesitation noticed in a number of government policies. In particular, chapter 2 will document that on account of the lack of scientific information, up to the 1980s tourism was seen from a short-term profit point of view, a situation which is nowadays recognized as responsible for the disruptions experienced in areas of high tourism potential (e.g., the Caribbean and Mediterranean and now Thailand, Malaysia, India, the Philippines, etc).

In spite of the fact of having achieved great levels of importance within the administration of a number of countries (see chapter 3 and in particular figure 3.2), what in practice is noticed is the fact that, though recognizing its importance (the figures speak for themselves), most governments do not know how to tackle tourism problems. Focussing on the Portuguese

situation, chapter 5 illustrates in particular how important tourism is to Portugal, and the interest of the Portuguese government in the tourism sector, but, at the same time, the bizarre organisation of Portuguese tourism organisation, and, in particular, the planning and management of the tourism sector at the regional level (see chapters 5 and 7).

1.5 The concept of planning

Another concept that, implicitly or explicitly, will be present in this report is that of planning. Therefore, it seems sensible to clarify the way in which this concept will be used.

When looking at some common definitions it is found that planning is usually viewed as an activity linked to the production of plans. For instance, the Oxford Study Dictionary (1991, p. 521) defines it as *making plans, especially with reference to the controlled design of buildings and development of land*. However, planning is not exclusive to planners but is also typical of many other activities. For instance, among sociologists planning is viewed as an activity seeking, among other things, *the best organisation of resources to combat poverty or racial discrimination* (Cherry, 1970, p. 1). Kotler (1994, p. 68) says that planning is a common activity in a number of companies, because they have to plan marketing strategies and tactics for specific products. According to Thirlwall (1989, p. 179) planning, in a variety of forms, is an activity frequently advocated among economists as an alternative to the market mechanisms and the use of market prices (for an expanded analysis see section 3.2.5). For a common citizen planning is also part of his/her daily life. Consciously or otherwise, an individual's life is a series of planned activities.

There are some basic notions linked to the planning concept that seem important to introduce here. The first one is the fact that only humans plan their activities. In other words, whereas animals are guided by instinct (e.g., feeding, reproduction, defense, habitat delimitation, etc) humans are able to act and react on a rational basis. In particular, the human brain enables mankind to evaluate the surrounding environment and, in face of different scenarios, to choose the one which best suits their aims.

Second, planning is not an activity 'invented', or 'discovered', in modern times. Remarkable forms of planning may also be observed in remote civilizations such as in the Mayas civilization, in the Fertile Crescent (e.g., ancient Mesopotamia and Egypt), old Greece, the Roman Empire, etc. In short, planning is an activity linked to all civilizations; only its form, contents and degree of development vary from place to place as a function of the historical period, geographic location, available knowledge, culture, socio-economy, political and

administrative organisation, etc. This is an issue which will be the subject of an expanded analysis in the following chapter.

Third, despite being linked to all individuals' daily life, the planning attitude emerges principally in situations in which different individuals decide to stick together and organise their activities on a group basis (here enters again the notion of planning linked to society and civilization). In other words, development and evolution are closely tied to planning, and vice-versa; that is as society evolves, planning also evolves. For instance, the move ahead from, what Durkheim labels, the 'mechanical' society of the pre-Industrial Revolution period towards the 'organic' society of the post-Industrial Revolution, was based on the development of new forms of planning that made possible the coexistence of vast numbers of people within some particular areas (see section 3.2.1).

Fourth, although consistently forgotten by many planners planning must be addressed not only from a procedural point of view, i.e. the way in which planning activity is undertaken, but also from an organisational perspective, i.e. in terms of the organisational framework in which it is carried out. This is explained by the fact that the success of the planning forms designed by planners depend not only on their professional capacity and expertise but also on the organisational environment in which they work. This also serves to explain why this thesis provides two complementary views of the same problem: planning as a process (chapter 2) and planning viewed from an organisational point of view (chapters 3 and 4).

Despite the fact that planning was introduced here as linked to rationality and achievement, that, however, should not be taken for granted, because the idea of planning as a rational activity capable of guiding human destiny towards the 'best solutions' is strongly criticized by large numbers of people from different academic areas. Nevertheless, it will be seen later, that such criticism is to be understood within the context in which it is produced, since most of it targets the way in which planning is undertaken and not the importance of the planning activity (see sections 2.3.1 and 2.4.1).

Chapter 2 provides an expanded discussion of the way in which the idea and concept of town planning have evolved over the last two millenniums and in particular since the Industrial Revolution. The planning concept evolved from the notion of 'rational' and 'scientific' activity, towards the idea of 'process' or 'multidimensional activity' aiming at organizing the physical and socio-economic environment in order to get maximum profit from it (see sections 2.2.1 and 2.3.1).

For instance, up to the 1970s planning was viewed among town planners as *the application of scientific method (...) to policy making* (Glass, 1973, in Faludi, 1973b). Nowadays it is instead viewed as *a process for determining future action through a consequence of choices* (Faludi, 1973), or as an activity *concerned with anticipating and regulating change in a system, to promote orderly development so as to increase the social, economic, an environmental benefits of the development process* (Murphy, 1985, p. 156). In other words, it is assumed that *it proceeds by assembling actions into some orderly sequence* (Hall, 1992) and not on the basis of pseudo scientific approaches. As notably pointed out by Greed (1993, p. 3) *planning is not a straightforward subject in which there is one right answer or a fixed set of rules; it all depends on what one wants to achieve, and on the answer to the question 'How do you want to live?'*

The content and form of the planning activity have also assumed centre stage in a number of discussions promoted among economists. Planning is an issue surrounded by strong controversy, often offering a hot source of debate between those who are in favour and against state interventions in markets (see sections 3.2 and 3.3).

According to Sartori (1991), an extreme form of planning is that linked to central or total planning. The former Eastern communist countries are good example of this. Viewed from that perspective, planning is an activity undertaken on the basis of massive state interventions directed by some 'master minds'. That means that there is limited private property ownership and also that the whole society is regulated through a central directed economy.

Total planning also means, for instance, that the leisure and travel market is regulated by a central government that decides when, where, for how long, and under which circumstances the citizens should spend their holidays. Under a central planning system, the planning of the tourism activity is undertaken by central tourism agencies which control the functioning of the tourism industry. Such state agencies are responsible for organising the people's holidays. Such holidays are viewed as activities undertaken at the expense of the government ('social tourism'), and, as in other fields, they follow guidelines set up under a master plan for society (Toffler, 1990, p. 416).

In opposition to that, liberals argue that the market contains self-regulatory mechanisms capable of more efficiency than central planned decisions taken by some few people. In other words, the market system is viewed as a *'spontaneous order' monitored by its feedbacks* (Sartori, 1991, p. 155). According to them, planning should be viewed as an activity restricted to its minimum. This thought is well illustrated by the words of Conservative Nicholas Ridley, a former British Secretary of State for the Environment up to 1989, who stated that the ideal local

authority would be the one that meets just once a year in a private hotel to hand out the contracts (in Adams, 1990, p. 56).

It is nevertheless between these two extremes that most countries tend to design and put forward their planning activities. For instance, most of the development strategies set up after World War II were based on extensive state interventions in society (see sections 2.2, 2.3 and 3.2). In particular, town planners saw their importance increase after World War II due to the need to reconstruct Europe (see section 2.2.1). The 1950s and 1960s were also characterized by strong economic growth, the reason why massive state intervention was put forward in many places with the aim of accelerating and supporting economic expansion. As pointed out by Thirlwall (1989, p. 3) *in the wake of the great depression and in the aftermath of war there was a renewed academic interest among professional economists in the growth and development process and in the theory and practice of planning*. By that time planning was regarded among governments as an important activity, on account of its potential in the spatial organisation of towns and regions (town planning); to speed-up the development process (economic planning); and to combat poverty and other sources of social promiscuity (social planning).

However, as the world entered recession in the early 1970s, most governments had to shrink their activities. Furthermore, with the advance of neo-liberalism in the 1980s, and the questioning of the effectiveness of a number of planning actions implemented in previous decades, planning activity suffered strong attacks from a number of politicians, economists, planners, sociologists, etc, who strongly criticized its importance, legitimacy, efficiency and effectiveness (for an expanded analysis see sections 2.2, 2.3 and 3.3). In particular in England the 1980s were characterized by a phase in which planning activity lost a great share of its importance, and, by that time, planning had entered recession.

With regard to this, Greed (1993, p. 4) comments that when neoliberalism reached its peak in England, during the 1980s, a number of town planners had to look for alternative jobs in private sector organisations. Harris (1994, p. 393) also points out that *the political trend away from planning (...) (has) led some planners to redefine (it) in terms of management*. The growing number of British urban and regional courses implementing specializations namely in tourism management may also be viewed as a symptom of the recession affecting town planning, and the search for new sources of employment.

However, and as mentioned above, the importance of planning is cyclical. For instance, it is possible to observe that there are nowadays clear signs of a revival of planning activity. Even those who most strongly favour market-led approaches are already claiming more planning

approaches in areas where deregulation was the rule in the 1980s (e.g., housing, water and power supply, telecommunications, transportation, etc) (for an expanded analysis see section 2.4.1). Supporting a market-led philosophy but also opposing the wild speculation of the 1980s, many private sector investors claim that governments should create a climate of confidence among investors, by, for instance, clarifying the way in which investment should proceed (see Bishop et al, 1994). In reaction to this, and also taking into account other criticism that are discussed in the following chapter (section 2.4.1), the British government has over recent years rushed to create Regional Planning Guidance (RPG), in order to fill the vacuum left in the regional organisation as a result of the extinction in 1979 of the former Regional Economic Planning Councils (see Thomas and Kimberley, 1995) (section 2.4.1 provides an expanded analysis of this trend; see also the book entitled the 'Culture of Contentment' (Galbraith, 1992)). The introduction of another tier of government in the Portuguese administration (semi-autonomous administrative regions) is also a clear sign of that trend (see section 5.2.2).

A certain revival of the planning activity, linked to a state of disenchantment with the purely market-led approaches, may also be observed in other areas. Among other examples it may be cited the following: the demonstrations in France (January 1995) that paralysed Paris for several weeks, against cuts in the welfare state; the growing opposition in a number of EU countries to the implementation of a single currency at the expense of great social costs; the emergence of a more social and less economic approach in England raised by a renewed Labour party; and the substitution of the Portuguese liberal government by a Socialist one, elected on the basis of a campaign against the excessive economic approach followed by the former Social Democrat government.

Despite this, it should not be expected that planning in future will evolve towards the former extensive approaches undertaken during the 1950s and 1960s (for an expanded analysis see section 2.4.1). As particularly well described by McLoughlin (1995), Memon and Gleeson (1995), Ohmae (1995), Harris (1994), Alexander (1994), Gunn (1994), Handy (1994), Burrows and Loader (1994), Pearce and Butler (1993), Jarillo (1993), Healey and Williams (1993), Stoker and Young (1993), Hawkins (1993), Osborne and Gaebler (1992), Inskip (1991), Bennet and Krebs (1991), Cooke (1990a, b), McDougall (1990), Healey (1990), Toffler (1990), Brindley et al (1989), Haywood (1988), Faludi (1987), what one may already start observing is the development of a new planning concept and paradigm. Chapters 2 and 3 aim at guiding the reader through past planning theory and practice, and, on the basis of the theoretical, socioeconomic, political, and technological changes happened over recent years, creating the foundations for understanding what the planning concept, and activity, are likely to become in future (see section 2.4).

What will be noticed is that planning is becoming a much more flexible activity; that the tendency is for planning to be carried out 'with people rather than for people'; that planning will increasingly look for rational and informed solutions, away from the pseudo rational approaches of previous years; that planning is becoming an activity that looks at the systems as a whole, and not only on a narrow physical basis; that planning is moving away from restricted spatial systems and will increasingly be done on the basis of complex transnational networks of systems and organisations; that nowadays the planning activity makes use of sophisticated information technologies; and, last but not least, that the new emerging planning paradigm strongly makes claims for modern and flexible organisational structures capable of putting it forward. In particular this last issue will polarize many of the discussions that will take place in this thesis, and for which an expanded analysis is introduced in chapters 3 and 4.

1.6 Conclusion

As can be seen from the above sections, defining concepts like leisure, recreation, tourism and planning is a difficult, if not an impossible, task. Two main reasons may explain that. First, because in social sciences there is no such thing as a unique approach to the same problem. Things may be viewed from different perspectives; in particular, the concepts of leisure, recreation and tourism may be approached both from an organic or a holistic perspective, only depending on the perspective through which they are addressed, and/or on the scientific background of those researching into these matters. Even within each of these spheres different perspectives may be obtained, depending, again, on the way issues are addressed. As far as planning is concerned a similar situation may also be observed. That is, depending on the extent to which academics or practitioners favour or oppose state interventions in markets, the planning concept may assume different meanings and forms, ranging from extensive to restricted actions in markets and society.

The second main reason is linked to the fact that leisure, recreation, tourism and planning are matters that deal with people and society, that is, they are social sciences. With regard to this, the following chapter will show how society and people are permanently changing and the impact such changes have on the way these matters are viewed. The other side of the coin is the fact that as new concepts and ideas are brought into the leisure and planning fields, after being implemented, such ideas tend to affect the way society changes. In this way, the evolution of both society and social sciences tend to happen in parallel, and both are responsible for the way in which each one evolves. Due to this, and also to other characteristics that will be debated in section 2.4.1, Simon labels social sciences (including disciplines such as planning,

management, economics, architecture, anthropology, psychology, politics, etc) as the 'the sciences of the artificial' (Simon, 1969).

Another issue raised in the above sections is linked to the way in which planning should be viewed in forthcoming years. Particular attention was put before on the fact that tourism comprises an amalgamation of products and organisations. Despite that, the following chapter documents that up to the 1980s most of the tourism planning strategies were carried out on the basis of a narrow number of issues (mainly short-term profit). That is, because up to the 1980s most tourism planning strategies failed to address the physical, social and economic environment, that are part of the tourism sector, a number of developments launched in the 1960s and 1970s were responsible for jeopardizing their sustaining basis. Bearing that in mind, it is discussed in chapter 4 an alternative model in which the whole social, economic and physical environment may be brought into planning.

Taking then into account these three main comments, it can then be said that social scientists have to interpret the way society evolves, and, based on that, to propose alternative policies. This is what is attempted to be done in chapter 2. In particular, chapter 2 will introduce a discussion about the way in which tourism and planning have evolved over the last two millennia, with the objective of examining ways in which the planning activity is likely to proceed in the future. It will nevertheless be noticed that there is no such thing as a unique solution to the problems. Although justifying all steps, the reader should be aware that other ways could had been followed, if the research had moved into different directions. Alternative solutions to the problems raised here may then be targetted by other researchers, and new ideas may be introduced into the field, in a process of normal scientific evolution as suggested by Thomas Kuhn (Kuhn, 1970).

Chapter 2

Evolution and prospects of town and tourism planning

2.1 Introduction

It was seen in the previous chapter that planning is not an activity exclusive to planners, since there are many other disciplines where planning assumes centre-stage, such as marketing, sociology, anthropology, economics, politics, biology, and so forth. Nonetheless, the objective of this chapter is to centre the discussion on the evolution of tourism and urban and regional planning, while the concept of planning viewed from an organisational point of view will be debated in the two following chapters. As stated in section 1.5, it is the objective of this thesis to demonstrate that planners have much to benefit if they start to address the planning process not only from a procedural perspective but also from an organisational viewpoint. This is the reason why, after discussing in this chapter several critical issues in tourism and urban and regional planning, the debate will move towards the organisational framework in which planning should be undertaken (chapters 3 and 4).

It should also be noted that the concept of 'town planning' is often used with the meaning of, in a restricted way, planning of towns, or, in a broader sense, planning of towns as well as of their surrounding environment (see for instance Greed, 1993). With the later purpose town planning is synonymous with 'town and country' planning and 'urban and regional' planning. It is with this meaning that town planning is used in this thesis.

The objective of this chapter is to discuss the way in which town and tourism planning evolved up to the mid-1990s; the characteristics, strengths and weakness of the planning theory and

practice which supported planning activity up to the mid-1990s ('historic perspective'); and some of the most important issues which are likely to give shape to planning theory and practice in the foreseeable future ('trends').

To this end, the discussion which is presented below is split into three main sections: the first one discusses the situation of planning from the beginning of civilization up to the 1950s ('classic planning' - section 2.2); however, particular emphasis is placed on the events which dominated the period of the Industrial Revolution, since it was during this phase that modern planning emerged. As will be seen, the planning activity undertaken during this period was associated with the belief that most problems had a physical origin, and, therefore, the planning process should be primarily concerned with the physical organisation of systems; this will also explain why classic planning was so strongly influenced by disciplines, such as architecture and civil engineering.

It will also be seen that the end of World War II marked the beginning of a new era in society, which was responsible for prompting the emergence of a new planning paradigm ('rational planning' - section 2.3). With the need to rebuild several countries, which were devastated by the second World War, and in the face of rapid economic expansion, the scope of planning moved from restricted physical views of the system towards more comprehensive approaches, based on a wider range of disciplines beyond architecture and civil engineering, such as economics, politics, geography, quantitative analysis, sociology, psychology, etc. It will also be seen that the 'rational planning phase' has profoundly marked the way in which even in the mid-1990s planning is undertaken, the reason why this thesis provides an indepth insight into the characteristics of the planning theory and practice associated with rational planning.

Further, the chapter sets out to examine some critical events which took place during the 1970s and the 1980s, such as the first major oil crisis of the early 1970s; the replacement of the welfare state philosophy by market ideology; the expansion of neo-liberalism; the world globalization; the fiscal crisis; and the improvement in the standard of education; as well as the way in which these events were reflected in the way in which planning activity evolved during this period. It will be shown that, as a result of the transformation which has taken place during the last two decades, 'rational planning' has been strongly criticized and some of the premises on which it was based had to be abandoned, the reason why it is possible to observe in the mid-1990s the emergence of new styles of planning (section 2.4 - an emerging planning paradigm?). Taking all this into account, the chapter will attempt to examine some of the most important aspects which are likely to reshape planning theory and practice in the future, as well as the implications which such transformations will bring to the new planning styles which are hoped will be undertaken in the future.

It must also be pointed out that, despite being one of the main intentions of this thesis to discuss the evolution of planning and administration in Portugal, few references will be made in this chapter, and in the two subsequent chapters, to Portugal, for two reasons. Firstly, while the evolution of planning in countries such as England and the USA has been linked to the continuous replacement of paradigms and to the discussion of the strengths and weaknesses of previous planning experiences, the evolution of planning in Portugal up to the restoration of democracy in April 1974, followed, mostly, a political rationale. Therefore, a straight comparison between Portugal and other countries would be neither scientifically correct nor easy to do. Secondly, one of the objectives of this chapter is to look at good examples of planning theory and practice undertaken in other countries, and, subsequently, to compare them to the Portuguese situation which is described in chapter 5, in order to examine ways in which planning activity may be improved in the future in Portugal.

Finally, taking also into account that both England and the USA offer a wide field and are rich in literature about the way in which planning theory and practice have evolved; also, these two countries offer important references to many planning schools which have been set up worldwide, such as in Portugal; and, last but not least, the access to other examples of good planning practice is a problem which is difficult to overcome because of the barrier of language, it will be seen that many of the examples which are reported both in this chapter and in other parts of this thesis are based on information which is available in the Anglo-Saxon literature.

2.2 Planning up to the 1950s (classic planning)

2.2.1 Town planning

It is difficult to trace the origins of planning because it has been part of all human civilizations (see also section 1.5). Stepping back in time through the history of civilizations, planning may even be found in remote cultures. Looking at the way in which cultures were organized, forms of living, social and spatial organization, religion, etc., several planning patterns may be detected. For instance, ancient planning forms can be found in the Fertile Crescent (ancient Mesopotamia and Egypt), in ancient Greece, in the Roman civilization, Middle Ages, Renaissance, Baroque, etc. In particular, one may mention the Roman aqueducts for water supply, the Mayas' spatial organization, well pictured in Tikal, and the city of Alexandria, as some examples of man's preoccupation in organizing and making the best advantage of the surrounding environment.

Some historical periods were in particular notable for a certain perfectionism sought by man in making the most of the physical and natural systems. Not denying the relative meaning and importance of every single historical period, Benevolo (1967) claims that the Renaissance and, especially, Baroque, were periods when the greatest formal perfectionism was looked for in cultures organizing geographical systems. The palace of Versailles and the surrounding area, the Champs-Élysées, and the Tuileries gardens may be mentioned as good examples of this.

Despite the remarkable importance of all these planning forms it is, however, considered that Modern Planning started to emerge in the aftermath of the Industrial Revolution. Indeed, the Industrial Revolution was responsible for an enormous shift in human civilization. Traditionally enclosed in tight rural societies with low horizontal (geographic) and vertical (social) mobility, and highly dependent on natural ecosystems, man, since then, started building new (urban) ecosystems and breaking away from the dependency on nature. The creation of food excess, the invention of the steam engine, and the poverty of large segments of rural people living almost in feudal social structures, boosted the shift from the former rural societies to the new urban civilizations. It was then, as pointed out by Durkheim, that society evolved from a 'mechanical' or 'ad-hoc' organisation towards an 'organic' one (from an expanded analysis see section 3.2.1).

In particular in England the nineteenth century was a period of unparalleled social change, population growth and urban development (Cherry, 1970). In the Industrial Revolution period a massive movement of principally unskilled poor rural people, started to take place towards towns. Between 1821 and 1851 over 4 million people moved to urban centres. As the majority of the towns were unable to absorb this human tide, many problems started to emerge (e.g., uncontrolled growth of towns, growing population density, poverty, reduction in open space, low housing standards, water supply and sewage problems, the spreading of disease, etc) (for an expanded analysis see Ratcliffe, 1974; and 'The Life and Labour of the People of London' published in the nineteenth century by Charles Booth, quoted by Cherry, 1970).

In response to the low living standards, urban degradation and promiscuity, several philosophic movements started to emerge, drawing attention and suggesting solutions for tackling the situation. Some of the movements that became more popular are, undoubtedly, those which gave birth to utopic and scientific socialism, the first reflected in philanthropic ideals and the later personified in Marx's and Engels' philosophies.

In the urban field, a prompt reaction was also intensely felt, giving birth to a number of architectural philosophies. As the number of new proposals grew, organized movements also started to emerge, grouped around several planning schools.

Some classic examples may be brought into this discussion to illustrate more clearly the ideals embodied in these philosophies (Ratcliffe, 1974; Hall, 1992; Greed, 1993). For instance, Philanthropist Robert Owen (1771-1858) proposed the creation of workers villages based upon small (and controlled) numbers of people. Owen's plan was based upon a very rigorous spatial placement of all activities, and also included social measures such as the prohibition of tobacco and alcohol consumption. His plan, which aimed at improving the living standards of the working class, was never implemented.

The Garden City movement, headed by Ebenezer Howard (1850-1928), had its exponential in the Three Magnets philosophy. In Howard's opinion planners should tackle the urban problems by bringing the quality of life offered by the countryside into town planning; i.e. their solutions should comprise principles of town and country planning. Accordingly, his proposals included a set of self-sufficient boulevards in terms of employment, industry, commerce, and agricultural production. Residential areas, services, agriculture, and urban densities were planned following a rigid geometric plan of spatial location and dimension, with the objective of, in Howard's opinion, ameliorating the people's standard of living. Again, even if some initiatives were put forward, by the creation of an association, Howard's theories were never put into practice due to both financial problems and the inadequacy of his geometric plan.

Also, the Linear City philosophy suggested by James Craig is another classic example of the kind of theory from this period. This theory found expression in Don Arturo Soria y Mata's 'Ciudad Lineal' implemented in 1882. Seeking to solve socio-economic problems, the theory was based on rigid principles of social and spatial organization. His proposals included an urban development placed along a road. Housing, services, etc, were then supposed to follow that road, located in rigorous geometric intervals. According to Hall (1992), Mata's argument was that under the influence of new forms of mass transportation, cities would tend to assume a linear form. Following this principle, Mata proposed the creation of a linear city between Cadiz (Spain) and St. Petersburg (Russia), with a length of 1,800 miles.

Likewise, several other ideas were developed in an attempt to tackle the urban problems which emerged in the aftermath of the Industrial Revolution. For example, Le Corbusier proposed the creation of what he called as 'La Ville Radieuse', based on a set of cruciform tower blocks, to respond to the population's need for lighting and common space for circulation.

Charles Fourier suggested the development of a special type of accommodation unit called 'Phalansteries'. Again, social problems were supposed to be tackled by rigorously defining the population's dimension and density as well as the spatial location of productive activities and

services. Henry Wright and Clarence Stein, by designing and developing the concept of the 'Neighbourhood Unit' to provide accommodation for the working class, had a similar approach to that introduced by Charles Fourier, and their plans were considered, according to Ratcliffe (1974), *too framed to the human scale*.

Patrick Geddes' (1915) proposals were also based on similar premises. Nevertheless, the originality of developing the regional planning concept is usually attributed to Geddes. He claimed that urban problems and solutions could not only be found within towns but instead looked in the whole hinterland, due to the interrelationship of these two systems. Since Geddes, planning has been looked at on a different scale, centered not only on the urban sphere but also on a regional basis.

Many other examples could be brought into this discussion (for an expanded analysis see Ratcliffe, 1974; Hall, 1992; Greed, 1993). However, the most important message to be retained is the main philosophy supporting all these approaches. In fact, a careful reflection on the examples introduced above shows a similar pattern in the way in which problems were analyzed. Indeed, planning solutions in this period were always sought in a twofold perspective. First, solutions were always viewed on a physical/spatial basis. Second, the solution to the problems was based on a deterministic approach. In other words, the perspective developed after the Industrial Revolution was that urban problems have a standardized physical origin for which a solution may always be found (Cherry, 1970).

For instance, in Corbusier's opinion the scarce space in our towns may be solved by building high blocks, able to accommodate a large number of people and, thus, releasing areas for common use. In Mata's linear city the assumption was that if mass transportation was a structural element in a future town's development, so, towns should be designed in a linear way in order to support and improve traffic flows. The other examples mentioned above were also based on a deterministic approach where, in the face of a 'stimulus' a 'response' could be found. In this way, the planner's role should be oriented towards the identification of problems and the presentation of physical solutions to them. This perspective gave origin to the principle of 'survey-analysis-plan' (also labelled as 'survey before plan' or 'Blue-Printing phase'), as the ruling planning philosophy after the Industrial Revolution.

A characteristic of the survey-analysis-plan phase is that it acts principally through the medium of a 'master plan' (physical plan), and by the use of technical standards and land use regulations (Ratcliffe, 1974). Faludi (1973a) defines this way of planning as *the production of glossy plans and the unanswering execution of proposals they contain*. Again according to Faludi (1973a), this philosophy of planning is restricted to the preparation of a *plan, which will*

consist of one or more goal statements that are successfully reduced to more specific policies, programs, and projects, all spaced out over a limited period of time and related to sets of priorities, standards, investment needs and financial arrangements.

Another characteristic of Blue-Printing planning is, therefore, *an approach whereby a planning agency operates a program thought to attain its objectives with certainty. In this way modification during implementation is not anticipated.* With regard to this Hall (1992) states that *the blue-prints presented seldom admitted alternatives because they always presented a true vision of the future world.* Accordingly, most planners saw themselves as *prophets* able to diagnosis urban *pathologies* and, in face of them, to prescribe the best solution for them. Given an image of the way Blue-Print planning operated Faludi (1973a), quoting Weber (1968/69), argues that *the planning tools from this time were taken directly from the kit-bag of civil engineering, to explain both the deterministic approach adopted in the urban problems and the prominence of civil engineers and architects in the field.*

As a consequence of the rigorous characteristics in which it worked, Blue-Print planning operated upon a rigorous established administrative structure, and is ideally portrayed in the system formally adopted in the UK after 1947 (Ratcliffe, 1974), as well as in the first town planning legislation which was passed in Portugal in 1934 (for an expanded analysis see section 5.2.1). Most of the administrative frameworks in which blue-printing planning operated, i.e. Weber's bureaucratic model (see section 3.2.2), was built on the belief that 'military discipline', 'rigour' and 'inflexibility' should be the basis of the organisation of society (section 3.2.3 provides an expanded discussion of the similarities between blue-printing planning and Weber's bureaucratic model). The administrative structure set up in Portugal when the dictatorship reached power in 1926 is also good example of that (see section 5.2.1)

Most of the criticism raised against Classic Planning is linked to the principles by which it was supported. Beyond the high level of utopia, Classic Planning emerged from the 'positive' knowledge introduced by August Comte's philosophy.

An important premise of positivism is the capacity of man for 'intuition'. Therefore, it was thought that, after a detailed analysis of the environment, planning solutions could be found by intuition. This process of problem-solving may be described by the method followed in classic planning education, available in several Geddesian handbooks: *Having made his civic survey, the student retires, let us say, into his meditative cell. He takes with him a carefully built up store of mental imagery ... of the given city and its inhabitants as evolving towards definite ideals or degenerating towards their negotiation ... (Then) the student of sociology re-emerges*

into the world as civic statesman ... The man of action is getting ready with a programme and policy (Branford, 1914; in Faludi, 1987).

Two other main causes may in addition be pointed at to the Classic Planning decline (Faludi, 1987; Rosa Pires, 1991). To begin with, it was noticed that most classic planning solutions were difficult to implement, because they were produced in 'laboratory atmospheres', i.e. far from reality. Yet, even if implementable in the short-term, the inflexibility shown by classic plans proved their inadequacy in answer to a permanently changing environment. Besides, it was found that human systems neither respond in a linear way, nor is the evolution of society (exclusively) the result of physical determinism. Instead, responses in society emerge from an interaction of different variables, ranging from psychology, sociology, history, culture, politics, economics, ecology, etc. Therefore, it started to be increasingly argued that planning should move towards a corporate approach, having as a source of inspiration and knowledge other disciplines beyond the traditional civil engineering and architecture that inspired Classic planners. In other words, it was later found that classic planners' ingenuity in accepting linear principles in their methodological approaches should be abandoned.

In addition to these two main weaknesses, other problems were noticed in Classic planning. In particular, it was found that planning was ruled on an authoritarian and technocratic basis, completely excluding such a thing as external participation (Faludi, 1987). Indeed, Classic Planning approaches were unable to follow democratic procedures, because the 'intuitive technical solutions' were viewed as 'sacrosanct'. Planning was then an hermetic field exclusively ruled by those (planners) with special expertise in analysing and bringing about the best solutions for society. Although this criticism is usually applied to characterize the planning styles undertaken after the Industrial Revolution, while describing the Portuguese situation chapter 5 will show that it keeps a great deal of actuality when applied to the planning styles which are undertaken in Portugal in the mid-1990s (see section 5.2.2).

Revealing a strong level of rigidity and utopia, Classic Planning started showing its inadequacy in solving urban problems. Indeed, many plans were produced but only few were implemented. Besides, of those which started to be implemented, many were not finished or failed to lead anywhere. A good example of that is the Portuguese situation, since, although not only based on the shortcomings of the classic planning principles but also on a political reasoning, not a single plan was approved by the Portuguese government between 1944 and 1971 (see section 5.2.1). Bearing that in mind, planners started questioning their own philosophies, as well as looking for a new way of intervening in the urban systems.

As a reaction to Blue-Print planning an alternative way of facing planning started to emerge in the 1960s: the Rational Planning or Planning Process. Indeed, the feed-back produced from the Blue-Print planning phase proved that such a approach was inadequate in dealing with urban problems. The deterministic 'cause-effect' approach, the physical plan solutions found, and the inflexibility in adapting to a changing environment, led Blue-Print planning to failure. Planning experience has shown that urban problems are much more complex and are permanently changing, so, planning solutions are beyond 'simple' physical prescriptions of accommodation, green space, public services, facilities, etc. According to Faludi (1973a) it was the *gross-simplification and heavy-handedness of the Blue-Print planning* that led it to its (announced) death.

2.2.2 Tourism planning

The evolution of 'tourism planning' in the Classic Planning phase, even if evidencing some common features with its town planning counterpart, assumed a framework with some relevant distinctions. As will be seen later these differences started to disappear in the early 1970s as tourism and town planning started to root their approaches in a similar body of knowledge and techniques.

Going back to the beginning of civilization, and in a similar way of that followed in the previous section (section 2.2.1), one may notice that forms of 'tourism' may be observed in ancient civilizations, such as in the Fertile Crescent, the Mayas, the Roman Empire, Old Greece, etc. In particular authors such as Torkildsen (1992; pp.13-44), Murphy (1985; pp.17-29), Holloway (1985; pp.22-40), Burkart and Medlik (1981; pp.3-37), Heeley (1981), and Inskip (1991; pp.3-15) provide useful insights into this matter, by describing how the tourism phenomenon evolved over the last two millennia. In particular, Torkildsen argues that it is difficult to observe a distinct component of tourism planning up to the Classic Planning phase, principally because, up to then, one cannot talk about 'tourism' but instead about 'recreation' (see sections 1.3 and 1.4 for an expanded analysis of the 'recreation' and 'tourism' concepts).

Torkildsen says that in primitive societies the opportunity for leisure came with the obligations associated with festivals, weddings, sacred days, feasts, etc. Leisure was then an activity typical of both the elite and the populace. Recreational activities were in particular boosted by the development of agriculture, since excess food allowed some groups to start being involved in other activities not linked to land dependency. Although undertaken by all groups recreation in ancient civilizations was more usual for the wealthy, and were indicators of factors, such as

status, power, and political dominance, even if activities such as drinking and gambling were typical of all groups in society.

For instance in the Fertile Crescent civilizations (e.g., in the Assyrian, the Babylonian and the Egyptian cultures) leisure was characteristic of all social groups. Leisure activities, such as boxing, wrestling, archery, dance, arts, horse racing, hunting, drinking and gambling, were practiced indistinctly in all groups, even if some of them were more prevalent in the dominant classes. In particular, the royal parks and the zoological and botanical gardens in the Assyrian civilization exemplify the power and the distinctiveness of dominant groups.

In ancient Greece leisure was so important that it was even viewed as the *'leisure ethic' - the intelligent use of free time was the purpose of life ... Time for thought, contemplation, philosophy and self-development (was) required for happiness*, and leisure was defined as *time free from the necessity to work* (Torkildsen, 1992, p.17-18). Based on that assumption Aristotle argued that time should be grouped into two main categories, in accordance with the organic perspective discussed in sections 1.2 and 1.3: business and war on one side, and leisure and peace on the other. As a result of the popularity of leisure activities town planning necessarily included leisure facilities such as gymnasia, extensive gardens, open-air amphitheatres, etc. As will be seen in chapter 5, the vestiges left by the Romans in Portugal are good example of that (see section 5.3.1).

Although giving a different meaning, leisure was also viewed as a very important activity in the society developed by the Romans. In the Roman Empire leisure was regarded as useful for 'work' and 'fitness' purposes. In opposition to the Greeks where leisure was understood as an 'aesthetic' activity, the Romans saw leisure as a tool to prepare the armies to war, and to enhance the workers' physical performance for expanding the empire. In spite of that, leisure was also understood as an entertainment. Animal and human spectacles, chariot races, music and drama, were amongst the most popular Romans' entertainment. Again, as a result of the importance of the leisure activities Roman town planning necessarily included the construction of baths, amphitheatres, arenas, circus, etc.

However the popularity of leisure suffered a profound decline with Christianity. In the Medieval Age, the Church launched the belief that the objective of life was to prepare for the next life after death. Accordingly, human behaviour should be oriented towards 'moral' activities. Some forms of leisure were regarded as leading to the obliteration of such behaviour, and, therefore, should be banned from society. Work was considered as good and idleness as bad. Hence, while music and morality plays flourished, drinking, gambling and many other activities were considered as evil, even if practiced by some groups or in some special days.

The leisure framework introduced by Christianity prevailed until the Industrial Revolution, even if some signs of relaxation were introduced meanwhile. The Renaissance and the Reformation, the creation of the Anglican Church and its separation from the Pope's influence, and the development of Calvinism, helped relax the moral standards previously developed by the Church, and created some of the enabling conditions for the leisure boom which commenced in the Industrial Revolution period (for an expanded analyses see Torkildsen, 1992; pp.21-23).

It was indeed during the Industrial Revolution that 'Modern Tourism' started to emerge. The socioeconomic consequences produced by the Industrial Revolution were twofold (see section 2.2.1). In an initial phase there was an anarchic town expansion, since the existing infrastructure and facilities were unable to absorb the human wave coming from the rural areas. *As a result, from the villages where people lived amid nature, where children could play in the fields and families could walk in the countryside, people came to cramped conditions with little room to play and little time to enjoy nature. Recreation areas were not planned. For children, often viewed as cheap labour, the consequences were devastating and many forms of play were condemned as evil* (Torkildsen, 1992; p.23). In a second phase, as manufacturing started to employ larger numbers of people and some of the most urgent problems of feeding and accommodation were solved, population started to become more demanding about their living conditions.

Indeed, one of the most important outcomes of the Industrial Revolution was the creation of a new urban society based on new and more efficient forms of production. Such a situation gave birth to an increased economic prosperity reflected namely in terms of disposable income, easier horizontal mobility, and reduction of working hours. As salaries started to improve, and the number of working hours decreased, the population started to have time available for themselves and, therefore, became more engaged in activities other than work (for a complementary analysis see also sections 1.2 and 1.3 and in particular the discussion centred on figure 1.1).

Some academics have contributed with useful explanations describing the conditions that prompted the leisure expansion. In particular, Boniface and Cooper (1994; pp.9-16), in a section entitled 'The geography of demand for tourism' provide a discussion of this matter. According to them there are three main determinants in the travel and tourism market. Firstly, aspects linked to economic matters, population characteristics and political regimes. Secondly, aspects associated with the individual's characteristics, such as life style, life cycle, and personality factors. Thirdly, a set of 'technical' conditions of the tourist supply, encompassing price, frequency and speed of transport, as well as characteristics of accommodation, facilities,

and travel organisers. In spite of the importance of all of these they consider that economic reasons in particular are the basis of tourism demand: *a society's level of economic development is a major determinant of the magnitude of tourism demand, because the economy influences so many critical and inter-related factors* (Boniface and Cooper, 1994; p.10).

In other words, Boniface's and Cooper's thoughts are closely tied to the discussion introduced in chapter 1. That is, although one may address leisure from an organic perspective, one cannot forget that leisure must also be viewed from an holistic point of view because it only emerges when the subsistence and working needs are fulfilled (see figure 1.1). This argument finds additional support in the comments introduced in section 1.4, when the issue of the complexity of the tourism sector was raised. It was then discussed that tourism is not only about tourism organisations; the supply-side definition created by Smith (1988) illustrates particularly well that tourism demands a number of other sectors, including transport (air, land and water), services (e.g., car rental, restaurants, travel operations, accommodation, petrol stations, museums and theatres, theme parks, etc), etc.

Bearing in mind both matters, i.e. that the tourism expansion is linked to the fulfillment of other needs (subsistence and work) and also that tourism is horizontally linked to a number of non-tourism organisations, an important finding may already be addressed to governments interested in expanding it. The argument is that tourism expansion should not only be tackled by creating special ministries for tourism; instead, it must be viewed in a horizontal way, that is with links to other (social, economic, and environmental) sectors. This is why, among other reasons, it is argued in chapter 4 that the administration of the tourism sector demands a new organisational framework capable of bringing together all areas linked to the tourism industry (see chapter 4). However, what one may in practice observe is the fact that such a corporate approach was not part of the government's agenda, at least up to the early 1980s, as documented by a report published by the WTO (1980) (for an expanded analysis see section 2.4).

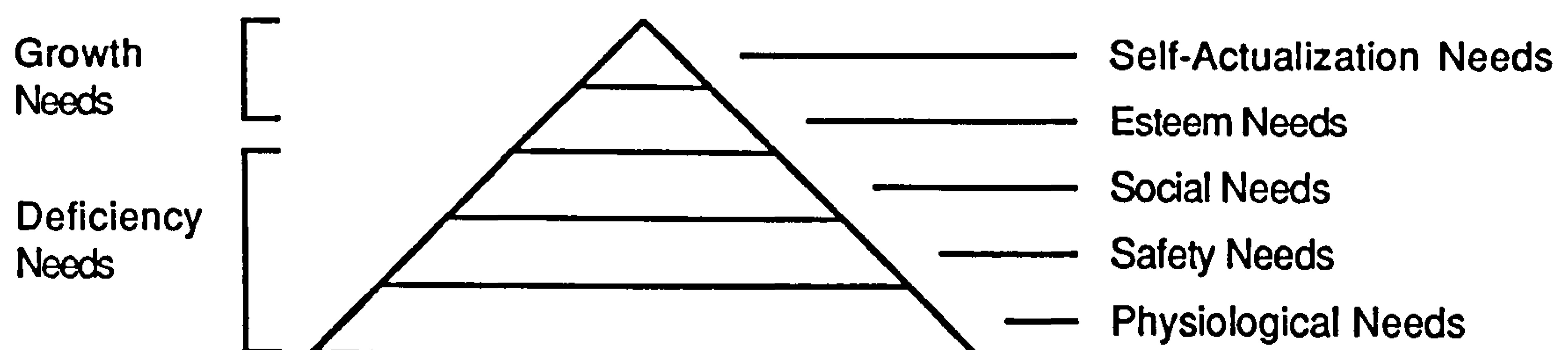
The argument that tourism must be viewed in an interconnected way has also found support in specialized literature drawing on tourism economics. For instance, Bull (1991), in a book exploring 'The economics of travel and tourism', reaches a similar conclusion (see in particular pp.26-45). He states that *tourism demand has been found to be relatively income-elastic*. In spite of that, he also argues that such a situation is not linear but depends on the way variables are analysed. He found tourism demand income-elastic if it is measured in terms of expenditure. However, if assumed in total tourist nights, demand is less elastic. Bull also concludes that demand shows different elasticity according to different forms of tourism. For

instance, business and luxury travel are relatively income-inelastic, when compared to general vacation demand.

Researchers working on organisational behaviour have also accounted for this matter by publishing research focussing on the people's hierarchy of needs. For instance, it is illustrated by Maslow's Hierarchy of Needs (figure 2.1) (see Vecchio, 1988; pp.173-175) that human needs can be categorized into two main groups: deficiency and growth needs. Deficiency needs comprise three main sub-groups: physiological needs (the needs for food, water, oxygen, sleep, warmth, and freedom from pain); safety needs (include the need for a secure environment such as insurance policies, job-tenure arrangements, saving accounts, and police and fire departments); and social needs (needs for affection, love and sexual expression). Growth needs include esteem needs (desires for achievement, prestige, and recognition, as well as appreciation and attention from others); and self-actualization needs (this group includes the desire for self-fulfillment which could be expressed in many ways, such as maternally, athletically, artistically, or occupationally).

According to Maslow, the individual's hierarchy of needs follows the scheme represented in figure 2.1. First of all, humans look to overcome basic issues related to physiological needs. After fulfilling them the second group starts to emerge. The other groups arise according to the sequence represented in the chart. In spite of that, it has been observed that in some individuals higher-order needs emerge before the fulfillment of the lower-order ones. It is however considered that such situations, even if likely to happen, are rare and do not follow the 'average' pattern observed in society.

Figure 2.1 - Maslow's hierarchy of needs



Source: Vecchio (1988; p.173)

The discussion brought about by Boniface and Cooper, Bull and Maslow explain the way in which in the aftermath of the Industrial Revolution, and in further periods, societies started to increasingly engage in the travel and leisure activities. As can be seen, the economic aspects are

on the bottom line of the travel and leisure expansion. That is, the individual's needs for travel emerge when disposable income (the remaining income after the fulfillment of the basic needs) increases. In other words, disposable income boosts higher-order needs.

In this respect, the Industrial Revolution gave birth to a more efficient society, and to the rise of disposable income. After the Industrial Revolution living standards started to improve at a very fast pace. In particular, Krippendorf (1982; p.136) describes how industrialization changed the German economy. He argues that industrialization has substantially increased disposable income for all society groups, and as a result has brought about significant improvements, for instance in the increased ownership of private cars and the reduction in working hours.

Also in England better salaries and the reduction of working hours constituted the main enabling conditions and motivation for people to start travelling. As a result of an increased demand for leisure activities, operators started to offer day-trips directed to places away from the urban centres. Steamers operating along the major rivers and rail links to the sea or mountains (pioneered by Thomas Cook in July 5 1841, with 570 passengers between Leicester and Loughborough (Murphy, 1985; p.19)), launched the movement of people towards flourishing tourist resorts, located away from polluted towns, and gave origin to the concept of a *tourist region* (Heeley, 1981).

As a result of the wealthier society created by the Industrial Revolution, individuals also started to become more aware and demanding about the urban living conditions. In England such a situation was accompanied by increased lobbying for facilities and legislation related to leisure activities. Accordingly, the first piece of legislation concerning recreation was published under the Public Health Act 1848. This legislation attempted to improve the (bad) health conditions which had arisen from the Industrial Revolution, and had direct effect on recreation since it conferred powers to local authorities to provide public walks and pleasure grounds to improve local living conditions (Torkildsen, 1992; p.130).

In spite of that, and as notably pointed out by Cherry (1975; pp.1-7), it is impossible to speak about a tourism planning school up to the 1920s, on account of the following. To begin with, 'tourism planning' was undertaken alongside the other problems faced by town planning, such as housing, water supply, transportation, etc. Then, the scope of town planning was confined largely to matters of civic art, housing layout and design, the propagandists' lobby for garden cities, and the preparation of a handful of schemes for suburban development (see section 2.2.1). Moreover, most of the tourism matters were left in the hands of the private sector. Lastly, one cannot talk about tourism planning up to the 1920s because most actions focused on 'recreation management' rather than on 'tourism planning'.

Particular support to that also comes from Inskip (1991) who argues that unlike the significant school movements of town planning described before (section 2.2.1), tourism, during this period, consisted of a *simplistic process of encouraging new hotels to open, making sure that there was transportation access to the area, and organizing tourist promotion campaigns*. According to him, this type of planning *was often successful for the development of individual hotels or small resorts*. Even in the emerging tourist resorts, tourism was undertaken according to town planning guidelines, to which some marketing initiatives were added by private entrepreneurs seeking their own profit, without a systematized approach or a growing school in tourism planning. Hence, and in spite of its growth potential, the 'tourism industry' was not looked at by governments as an important activity. Instead, tourism was almost exclusively left in the hands of *practical men, who did not look beyond the possibilities of private profit ... and was not greatly affected by central government activities* (Heeley, 1981). As will be seen later in chapter 5, the situation in Portugal was similar to the one observed in England, since in the early days of tourism development 'tourism planning' was an activity undertaken within the sphere of influence of town planning, to which rudimentary economic plans were added; the case of the first resort launched in the Estoril being good example of that (see section 5.3.1).

It was only after the 1920s that tourism planning started to emerge. In particular in England, with the publication of the Physical Training and Recreation Act 1937, the National Parks and Access to the Countryside Act 1949, the Countryside Act 1968, together with other publications such as the recreational standards of provision established by the National Playing Fields Association (NPFA) in 1925 (Torkildsen, 1992; pp.130-133; Cherry, 1975; pp.1-3), tourism started to be viewed in a more systematic way among the Government's policies. In particular, the movement of people from towns to the countryside, looking for leisure and recreational amenities, created the need for an institutional framework able to protect the national parks and the countryside, as well as to provide countryside facilities for this emerging demand, for, among other things, rambling, hiking, and cycling facilities. Chapter 5 will show that the emergence of a distinctive tourism approach in Portugal took place only in the mid-1950s, as a result of the tight control developed by the dictatorship over the tourism sector (see section 5.3.1).

In spite of that, tourism was not looked at as a prominent activity and therefore the government's focus was oriented towards the need to protect the natural and man-made amenities. That is, planning was oriented towards the need to delimitate tourism expansion and avoid its negative side effects. Meanwhile, the private initiative continued developing on its own, following the governments' pieces of legislation passed to protect nature, and in particular

the countryside. As a result, planners knew little about leisure, while the leisure profession knew little about planning (Torkildsen, 1992, pp. 132).

It was within this framework of mutual distance and misunderstanding between leisure developers and town planners that tourism evolved up to the 1960s. However, the growing number of mushrooming developments launched between the 1960s and 1970s showed that such an approach was unable to deal with the negative impact that tourism may produce on the destination areas when they are left on their own. It was as a result of such experiences that there was a shift in tourism planning theory and practice. This is what is to be discussed in the following two sections.

2.3 Planning between the 1950s and 1970s (rational planning)

2.3.1 Town planning

As a result of the controversy and ineffectiveness underpinning the Classic Planning approaches (section 2.2.1), new planning attitudes were put forward in the 1960s. It is suggested in literature (see Hall, 1992; Faludi, 1987; Glass, 1973; Greed, 1993) that an important contribution to the development of the new planning paradigm which emerged in the 1960s, came from a flourishing social sciences 'school' launched in the US in the 1940s. Following Hall, thinkers such as Chester Barnard, Peter Drucker and Herbert Simon strongly contributed to the establishment of a new planning paradigm, by shifting the emphasis of planning education from 'making plans' to 'education in planning method'. By that time planning education started to establish its own body of knowledge, and become *a profession in its own right* abandoning the traditional approach of *a profession consisting mainly of people with a basic qualification in another profession* (Faludi, 1978).

Faludi (1987) suggests that the Chicago School, more properly the Program of Education and Research in Planning offered at the Social Science Division of the University of Chicago, was the place where the seeds of the new planning paradigm started to flourish. He supports his argument by classifying the Chicago School as *the meeting ground of those interested in the application of the social sciences to practical problems on the one hand, and city and regional planners concerned with broadening the foundations of their professional expertise on the other*.

The second main reason why the new planning concept emerged, came from the need to turn planning into a more democratic process. Against the 'methodological' linearity defended by

Classic Planners, other academics started defending the view that *the right course of action is always a matter of choice, never of fact* (Davidoff, 1965), because there is no such thing as a 'sacrosanct' intuition leading to the absolute truth. Bearing that in mind, it was then argued that decisions could not exclusively be reached by intuition, because, among other things, they overlap other sciences such as politics. In other words, it was definitely assumed by planners that *(they) take over in the field of politics* (Faludi, 1973b), for two reasons. To begin with, it was observed that in practice politics was a component of the decision-making process. Furthermore, even if planning is a decision-making process, one cannot forget that it is carried out with the aim of feeding the decision-taking process. Therefore, the advantages of bringing these two fields closer became clearer, even if recently some academics have argued that planners do not make final decisions, and, hence, may not be fully responsible for policies put into practice by politicians (see Harris, 1994, p. 393). As a result of these viewpoints, planning has started to adopt much more flexible approaches, and has also become more participatory and, thus, more democratic.

A third reason leading to the development of a new approach came from the criticism raised against the way in which planning solutions used to be designed during the classic planning phase. As mentioned before, classic planning solutions were always looked at in very great detail, through very precise large-scale maps showing the exact location of all land uses and proposed developments. Conversely, the new planning concept started to adopt more flexibility, drawing attention to broad principles rather than to details. Hall (1992) states that one of the main characteristics of rational planning is *the stress put on the processes, or time sequence, by which the goal has to be attained*, rather than on the (physical design of the) desired end-state. Again following Hall, *rational planning starts from a highly generalized and diagrammatic picture of the spatial distributions at any point of time, only filling in the details as they needed to be filled in, bit by bit*.

A fourth new perspective brought to planning was the belief that systems could evolve in an automated way. The idea of 'automated systems' came from the developments in cybernetics. Accordingly, several planners started to suggest that cybernetic principles could also be introduced into planning. Particular support for this comes from Hall (1992) when mentioning that *cybernetics has profoundly affected the way planners think about their job and the way they produce plans (...) and to a large extent the new concept of planning is embodied of the cybernetics principles*.

The expedition to the moon in 1969 was one of the most efficient applications of cybernetics. The adjustments to the spacecraft rota were operated not from a device but from a complex computer-control system located on the surface of the earth in Houston, Texas. The device was

responsible for reading the environment around it; information was transmitted to the computer located on earth; the computer located at Houston received information, and by processing data changed the rota of the device whenever appropriated. Bearing that in mind, it was also argued that *the development of cities and regions could be controlled by a computer that received information about the course of development in a particular area, related this to the objectives that had been laid down by the planners for the development during the next few years and thus produced an appropriate series of adjustments to put the city or the region 'on course' again* (Hall, 1992).

In spite of the apparent utility of these principles, criticism was raised against them when they were applied to planning. In particular it was argued amongst academics that *human mass behavior is too complex and too unpredictable to be reduced to cybernetic laws* (Hall, 1992). With reference to this Hall mentions that cybernetic principles (interaction 'man-machine') have successfully been applied in situations where such liaison, between man and machine, may bring great advantages. In particular, he gives the example of some urban traffic control systems where traffic control is operated by automated systems, a situation which has tended to increase principally in some congested routes, such as motorways and bridges.

Despite the shortcomings pointed out of the use of cybernetics in the planning and management of complex situations, it is a matter of fact that such principles have had a strong influence in the way in which planning is viewed at present, since phenomena started to be viewed as complex interacting systems (Hall, 1992). Indeed, the following sections and the two following chapters illustrate that nowadays the tendency is to address the world from a systems approach. Even if it is no longer accepted that systems may be automatically controlled by the use of computers, it is, nevertheless, believed that the world is based upon a number of interconnecting phenomena and, hence, that successful planning forms must be able to capture such interconnecting relationships. The alternative model introduced in chapter 4 (tourism networks) is in fact based upon some of the principles which support the cybernetics philosophy.

Finally, in addition to the criticism raised against classic planning, some other external factors also prompted the development of a new planning paradigm. In particular, as a result of World War II, many parts of the world were either damaged or completely devastated. It was then believed that reconstruction and prosperity could only be reached by stimulating the involvement of all economic and social actors. Owing to their diverse backgrounds, it was then thought that planners could foster cooperation among organisations and accelerate development (Gellen, 1985). Hence, this period was characterized by an increased interest of planners both

in public and private sector organisations (Perloff, 1957), since they were viewed as being suitable for carrying out the job.

It is within this scenario that the 'Rational Planning' paradigm emerged about the middle 1950s. Faludi (1982) describes it as a 'decision-centered view of planning'. Rational planning assimilated the novelty of social sciences, and also postulated that solutions could be reached according to rigorous and unambiguous scientific approaches (Faludi, 1987). Therefore, it was viewed among planners as an efficient tool to guide social changes and to curb the 'irrational decisions' of politicians (Sarbit, 1983), leading some academics to go even further along this idea and assume it as a 'fourth-power' of Government (Tugwell, in Faludi, 1987), or, alternatively, seeing the planner as an 'administrative man' making rational decisions like the 'economic man' (Simon, 1976; in Faludi, 1987).

The principles supporting the rational planning paradigm are well described by its method (Faludi, 1987): *first, the decision-maker considers all of the alternatives (courses of action) open to him, i.e., he considers what courses of action are possible within the conditions of the situation and in the light of the ends he seeks to attain; second, he identifies and evaluates all of the consequences which would follow from the adoption of each alternative, i.e., he predicts how the total situation would be changed by each course of action he might adopt; and third, he selects that alternative the probable consequences of which would be preferable in terms of his most valued ends.* Accordingly, plan preparation had to follow a set of 'packaged scientific steps' for reaching rational solutions. To start with, it should include an analysis of the situation, with the aim of raising the variables influencing processes as well as inherent limitations in developing solutions. Furthermore, an end reduction and elaboration, for selecting relevant ends and the weights attached to them. Then, the design of the course of action, based on the scientific knowledge previously collected. Finally, the comparative evaluation of consequences, for finding the most rational choice.

It is yet interesting to note that, according to rational planning supporters, public interest is carefully taken into account in the decision-making process, because decisions are reached in a rigorous and scientific way, that is in the absence of any kind of external pressure. Owing to this, planning was viewed by this time as a neutral activity. Hence, public participation was completely ruled out from the decision-making and -taking process.

A variation of the rational model (Faludi, 1987), labelled the 'Systems Approach', which emerged in the 1960s, took even further the concepts supporting the rational model. In England, the systems approach had its exponents in Brian McLoughlin's and George

Chadwick's proposals (figures 2.2 and 2.3). These models were also influenced by the quantitative analysis developed in the 1960s.

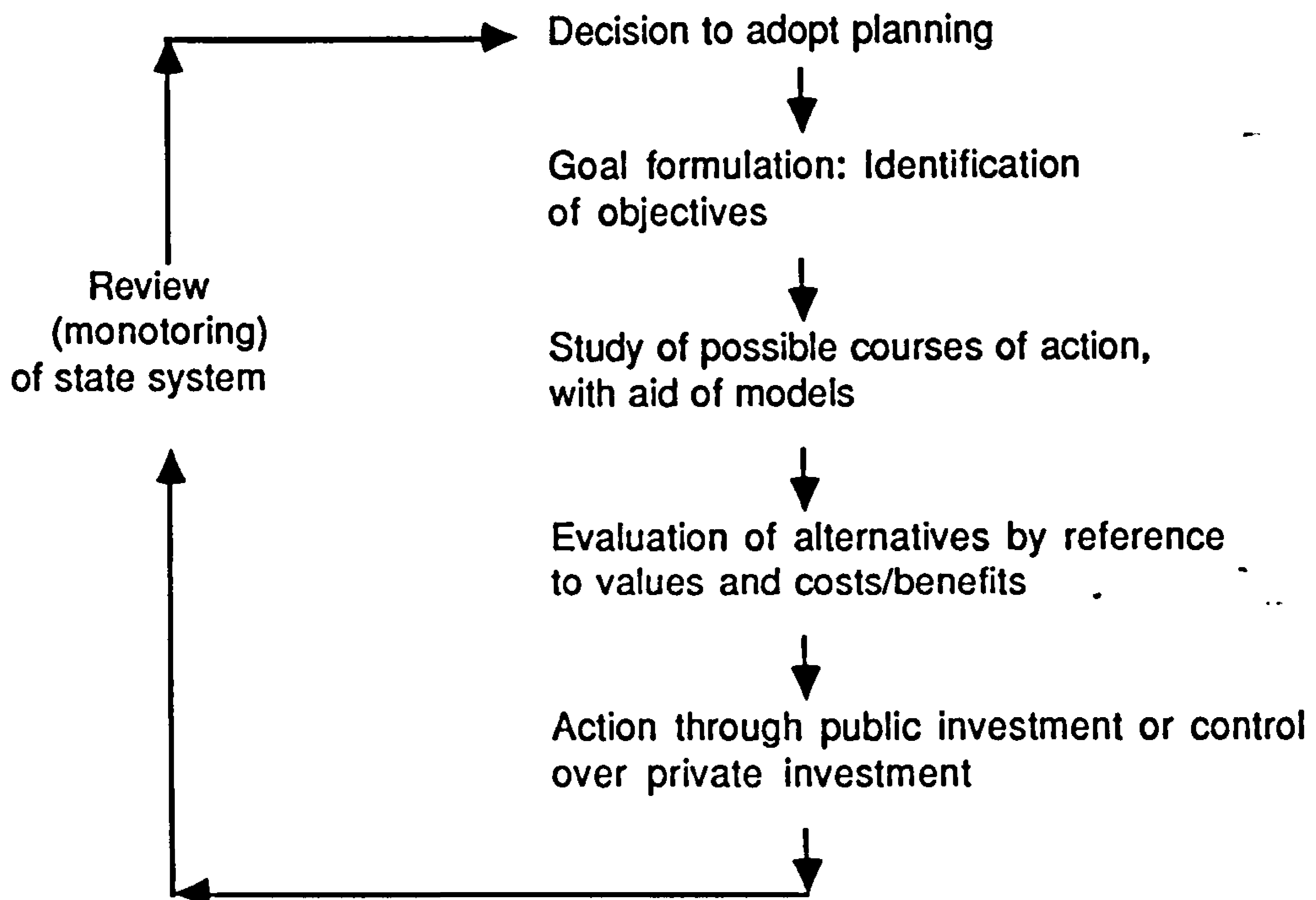
According to McLoughlin and Chadwick, their models offered a tool to control the system's behavior in an effective way. Taking into account that everything is related to everything else, i.e. that systems behave in an interconnected way, the systems approach philosophy was based on the belief that controls could be introduced in the systems and the future oriented according to desired policies. McLoughlin and Chadwick believed that rational decisions could be brought into complex social systems. Such a philosophy was strongly influenced by Descartes' positivist theory, which was expanded in the US in the 1960s.

Indeed, the 1960s were characterized by the development of quantitative models. It was then argued that purely mathematical relationships could be detected in the system's functioning. According to Massen (1972) *this may be explained because planning abandoned the traditional deterministic approach, becoming much more tentative than in the past.*

Models for industrial location, population growth, migration, etc., then started flourishing in literature. Many mathematical analyses were elaborated in such a complicated way, going even beyond the limits of the reasoning. A 'pure' mathematical exercise involving dependent and independent variables may lead to ridiculous correlations, by comparing dependent and independent variables in a random way. For instance, comparing dependent variables such as 'crime' and 'ice-cream consumption', using an independent variable such as 'income', comparisons between crime rates and ice-cream consumption may indeed be established. In other words, if not used within limits and with a social basis, *statistics can become a mere 'cookbook' exercise in memorizing formulas and procedures* without practical adherence (Blalock, 1988; p.105). Even if not completely based on these philosophies, books such as those published by Wilson et al (1977), Roberts (1974) and Cortes et al (1974) share, to a certain extent, the viewpoint that explanation for urban and regional phenomena and, generally, for social sciences, may be viewed according to single mathematical relationships.

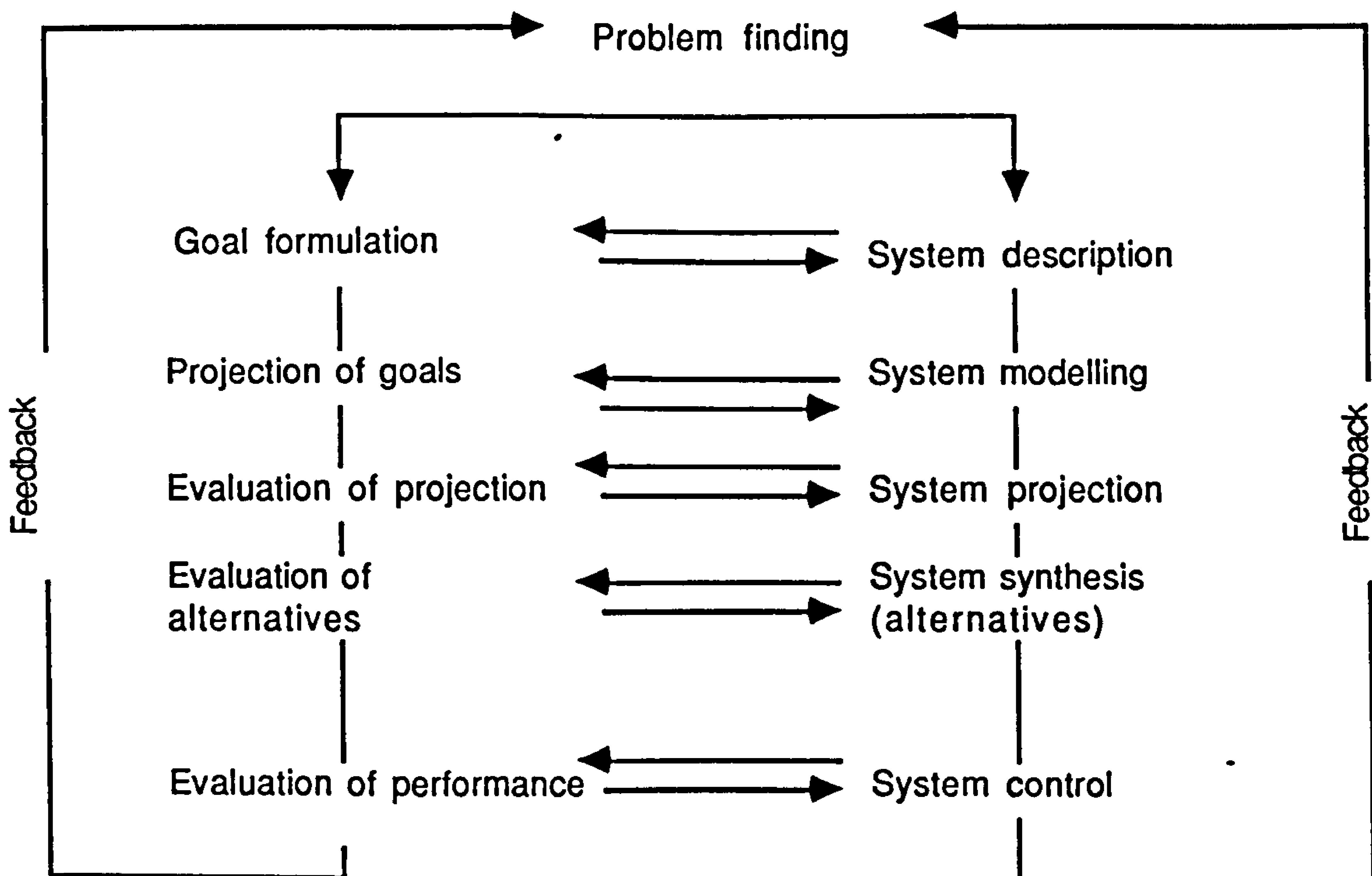
The emergence of the systems approach in planning is often explained as an attempt to avoid uncertainty and, thus, *with the prospect of relief from the discomfort of ambiguity and of having to decide things in the face of conflicting evidence and competing want* (Webber, 1983; in Faludi, 1987). Faludi classifies the system approach as *the last convulsion of classic planning*, because, compared to the former paradigm, its defenders also tried to assume a capacity to understand phenomena, and, thus, the power to control human activities. Rational planners behaved in an *arrogant way* (Faludi, 1987), as *helmsmen* (McLoughlin, 1970), assuming they had the capacity to control human's destiny.

Figure 2.2 - The planning process according to Brian McLoughlin



Source: McLoughlin (1969)

Figure 2.3 - The planning process according to George Chadwick



Source: Chadwick (1971)

However, it is believed that there is no such thing as scientific planning and, consequently, the systems approach *like dinosaurs, collapsed rather than evolved* (Lee, 1973; in Faludi, 1987). Indeed, *science and planning are very different sorts of enterprises ... scientists seek to observe, describe, and explain ... Planners are quite the opposite; their purposes are to change whatever it is they are confronting, preferably, of course, to improve it* (Webber, 1983) (see section 1.5 for an expanded analysis of the planning concept). As a result, the systems approach had a very short-life span, and was later strongly criticized by its own authors.

The decline of the rational approach may be found in the principles on which it was based. Like classic planning, rational planning was deeply embodied in utopia (Cherry, 1970). Indeed the concept of rationality is somewhat difficult to define and achieve. 'Rationality' today may be different tomorrow. Besides, rationality depends upon many (sometimes subjective) things such as data availability, objectives and resources. So, taking into account that pure rationality is an abstract concept it does not make sense to address a problem in that way. Camhis (1979) is particularly critical of 'rationality' arguing that *the concept of rationality stands on the same level as other general concepts like 'freedom', 'happiness', 'God', to which people look for the justification of their actions or for their dominance over other people*. Faludi (1978) goes further on this attack considering that 'rationality' is one of the tools utilized by planners when they are *promoting their 'values' at the expenses of others*.

In addition to this main criticism, Rosa Pires (1991), based on extensive literature review, draws attention to five other main problems linked to rational planning. First and foremost, in opposition to rational planners' desires, there is no such thing as 'neutrality' because planning decisions systematically benefit the rich to the detriment of the poor. Hirst (1976) also argues that rationality is blind to all considerations of social usefulness, and Simmie (1979) goes further with this argument suggesting that *planning has a tendency to accrue to those who are not most in need*. Using the findings from the research conducted by Lee (1963) and Bulpitt (1967), he attacks the absence of 'altruism' and 'neutrality' of rational planning approaches, stating that planning has a strong political component and that there is no such thing as neutrality because *planning is fundamentally a political activity*.

A second criticism, which is associated with the first one, is about the way in which public interest is taken into account. Under the perspective of the rational planning paradigm, planners target all society indistinctly because their actions are based on scientific knowledge. However, because the public interest cannot be seen as a 'unitary' concept but rather in an 'individualistic' way, and also because, as mentioned above, planning has a strong political component because decision-making feeds the decision-taking process, public interest emerges as an abstract

concept (Faludi, 1987). Indeed, today's position is in agreement that society is based upon different social groups with different social aspirations. So, *the public interest represents not a rational goal for planners to achieve but a reflection of the ways in which the society in which he lives makes its own choices about the distribution of its power and resources* (Simmie, 1979) (for an expanded analysis see also Johnson, 1972 and Schubert, 1960). This is another main assumption that supports the network approach that will be introduced in chapter 4.

The third issue, linked to the second one, is about the way in which public participation is addressed from the rational planning point of view. Meyersen and Banfield (1969) suggest that *since either the same or different decision-makers may employ opposed conceptions of the public interest, the question of which conception is to be regarded as the public interest, either in a specific situation or in general, may itself become a matter of controversy*. In addition to that, experience has proved that because different social groups have different economic and human resources, wealthy groups may easily impose their own objectives and influence the decision-taking process in their favour. It has also been noted that some medium and lower income groups such as the sick, the old, the immobile and the under-housed, show lower motivation to get involved in the participatory process, because they are not strong enough to compete with other stronger and wealthier groups (Fagence, 1977; Simmie, 1979).

The fieldwork conducted in Portugal also shows that, in the tourism sector, non-profit organisations are amongst those organisations with a lower competitive capacity, on account of the lack of resources and political influence (see chapter 5 and sections, 7.2.3 and 7.2.4). This issue assumes particular importance when it has been verified (Simmie, 1979) that *participation increases the flow of information between planners and their clients, and thus improves ... planning because decisions are more rationally arrived at on the basis of more data*. Therefore, what seems to have to be avoided is not the participation process itself but the way in which groups are taken into account in the decision-taking process. In this regard, Simmie calls particularly for the need to *adopt more sophisticated techniques of market research to discover the requirements of different groups in the community*. Inspired by these recommendations, Rosa Pires' and Costa's (1992) study conducted in Portugal shows some ways in which these recommendations might be put into practice and unbiased participation may be reached.

A fourth emerging criticism is about the pretentious 'socialist' perspective embodied in rational planning, when defending such things as 'public interest', 'neutrality' and 'scientific rationality'. Authors like Blowers (1982), Darke (1982), Davies (1972), Broadbent (1977) and Simmie (1979) attack this point of view arguing that in opposition to that evidence has shown that planning policies benefit capitalist interests, because their policies systematically benefit the stronger.

A final main issue is about the gulf between planning theory and practice. In fact, a strong criticism which was raised against planning was linked to the fact that whereas planning literature systematically followed one way, planning practice evolved towards a different one. In the 1970s and onwards this issue started to be targeted in a growing literature, because it is noticed that planning theory systematically calls for a role and importance not evident in practice. Words such as 'pretentious', 'premature legitimization' or even 'legitimization by cheek' are often cited against planning (Reade, 1982). Hence, growing numbers of academics have targeted this matter, in order to bridge the gap between planning theory and practice (see, for instance, Healey et al, 1982; Faludi, 1973a, 1973b, 1978, 1987; McConnel, 1981; McDougall, 1990; Brindley et al, 1989; Montgomery and Thornley, 1990). Rational planning in particular was accused of that because while in theory some academics were advocating things such as scientific rationality and public interest, some practical experiences had shown previously that these issues could not be dealt with in that way.

In spite of all these attacks on rational planning, it has been argued in literature that some positive aspects of this paradigm remain valid. In other words, what is highly criticized in rational planning is the arrogant and 'scientific way' of solving problems. As described before, the rational planning philosophy is indeed undermined by several weaknesses, since some of its ideological foundations and beliefs are based on the wrong premises. Nevertheless, the attempt to look for rational decisions is still very important. However, in parallel to rationality planners have to start taking into account other aspects affecting 'rational decisions' such as political aims, individualistic public interest, different levels of public participation, etc, in accordance with the comments introduced before.

The idea that 'rationality' is important in the way planners address problems is also supported by Faludi (1978). To begin with, he claims that rationality helps to find better solutions to the problems. In addition to that, to know what the alternatives and their consequences are, is also the best way of making responsible political decisions. Furthermore, the attempt to plan rationally results in learning. In this respect, he also argues that what has to be changed definitely is the way in which rationality is understood and not rationality itself. That is, *rationality is contextual, so planners do not have to evaluate all possible alternatives and respective consequences* (Faludi, 1978).

It seems that Faludi's arguments are valid and, in this way, rationality should never be lost from sight. Nevertheless, it may also be argued that when not considering all alternatives, by arguing that some of them are out of 'context', as suggested by Faludi, planning may incur similar criticism to those raised above. That is, by arguing that, for any reason, some

alternatives do not have to be considered in the decision-making process, planners may deliberately drop some solutions in order to favour some groups. Therefore, the lack of neutrality again becomes an issue. Alternatively, it seems reasonable that planners should always introduce in a transparent way all possible/detected alternatives, and only after that, and based on justified arguments, analyse those alternatives which are applicable to the situations being analysed.

It is within this scenario of discussion around the strengths and weaknesses of the rational planning model that planning evolved up to the middle 1990s. As will be seen later (section 2.4.1), planning in forthcoming years is likely to be built upon the rational model developed in the 1960s. However, the idea that solutions may be reached under a rational and scientific approach has meanwhile been removed from planning theory and practice. This is what is further discussed in section 2.4.1.

Finally, it should be pointed out the fact that while after World War II the progress of tourism planning theory and practice in countries such as England and the USA was based on profound discussions of the validity of rational planning, as seen above, the evolution of town planning during the same period in Portugal followed a political rationale. However, that is a matter which will be discussed later in section 5.2.1.

2.3.2 Tourism planning

It was also within the framework of discussion introduced in section 2.2.2 that tourism planning evolved in the 1960s and 1970s. Indeed, the developments operated in the sector over the 1960s led governments and private operators to put more emphasis on tourism planning and development, because tourism had shown a profitable sector in years before.

In fact, the 1960s were characterized by the introduction of very important (principally technological) developments, that launched the tourism industry into a prosperity never imagined before. In particular, the introduction of *the jet engine made possible to fly large numbers of people great distances at high speed. Furthermore, as aircraft design evolved, airlines were able to do so with increased comfort, because they could fly above the weather, and at very economic rates* (Murphy, 1985). Moreover, the socioeconomic enabling conditions introduced by the Industrial Revolution (see section 2.2.2) also continued to expand. Better incomes, reduction in working hours and increased prosperity brought about by a growing disposable income, associated with an easier capacity to travel (lower cost and more comfort and safety), launched an unprecedented movement of people into the travel and tourism market.

Unlike the former localized products created in the aftermath of the Industrial Revolution, based on traditional spas, seaside resorts and mountains, dominated by the cooler weather of the Northern European countries, coordinated actions involving airlines, hoteliers, tour operators and travel agents led to the injection of cheaper package holidays in the travel market, in the warm beaches of the Southern European Countries, such as Spain, Portugal, Italy, France and Greece as well as in the Caribbean. Likewise, cheaper winter packages, based on skiing or other entertainment around the comfort provided by a fire place, were also offered, by a growing tourism industry, to those looking for the amusement of the cold season. Winter holidays in the North and summer holidays in the South constituted the starting point for the mass tourism boom and for the tourism industry explosion of the 1960s. A pioneer article describing the early days of the European intracontinental tourist movement and suggesting its potential for developing the poorer (Southern) European regions, is that published by Walter Christaller in 1963 (Christaller, 1963).

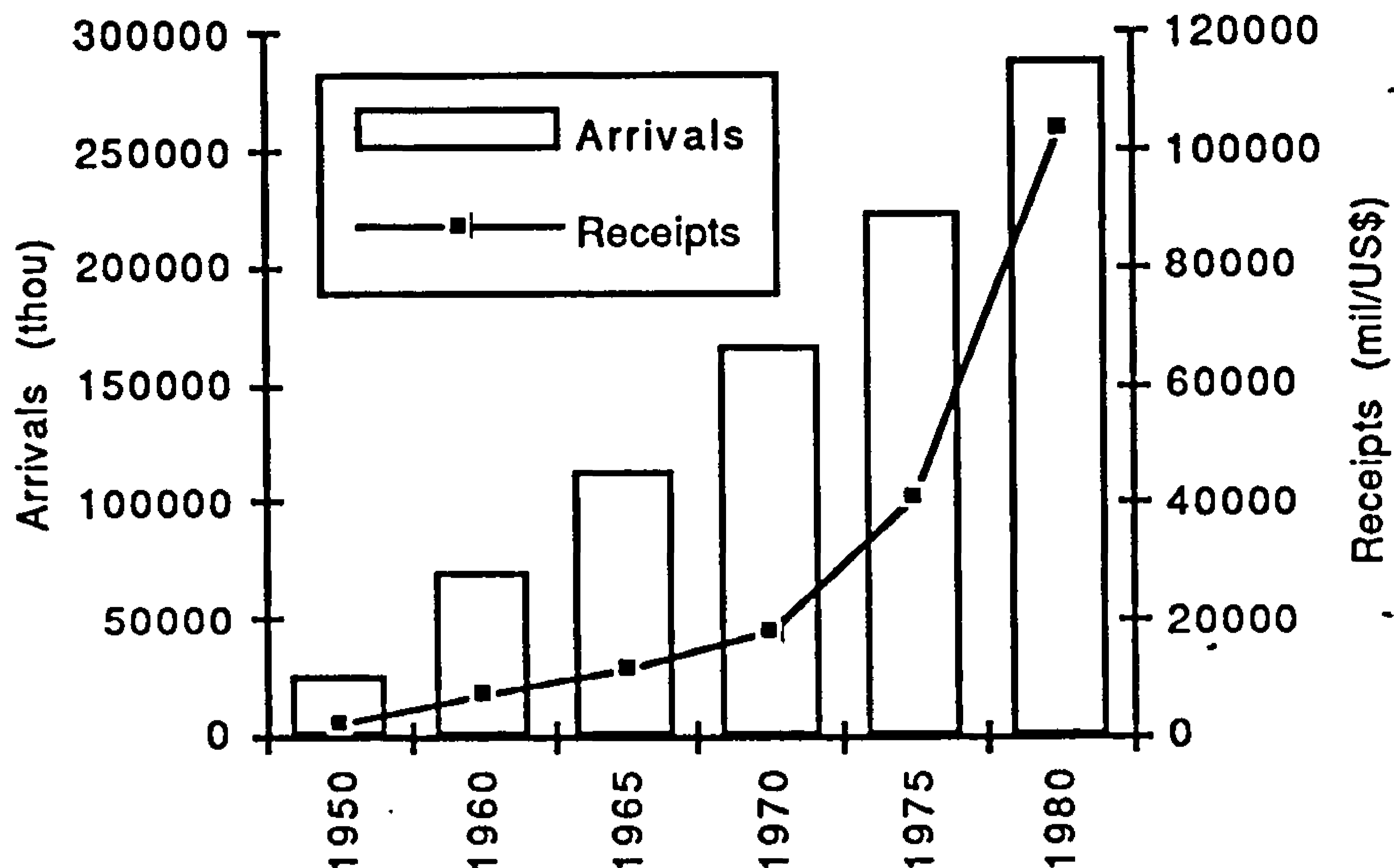
The tourism boom of the 1960s may be documented by some figures. Table 2.1 and figure 2.4 illustrate that the world international arrivals increased by 174% only between 1950 and 1960. In the following years, and even if a slight decrease was noticed in relation to the former period, the world tourism arrivals remained steady, expanding by 63% between 1960-65, and by 47% between 1965-70. Table 2.1 and figure 2.4 also show that the travel market receipts registered a faster expansion when compared to the international arrivals: 227% between 1950-60, 69% between 1960-65, and 54% between 1965-70. However, it will also be seen in

Table 2.1 - Arrivals of tourists from abroad and receipts from international tourism (1950-80)

Year	Arrivals (thousands)	% increase	Total (million US\$)	% increase
1950	25,282	-	2,100	-
1960	69,320	174%	6,867	227%
1965	112,863	63%	11,604	69%
1970	165,787	47%	17,900	54%
1975	222,290	34%	40,702	127%
1980	284,282	28%	103,062	154%

Source: WTO (1995)

Figure 2.4 - World tourist arrivals and receipts (1950-80)



Source: WTO (1995)

chapter 5 that the tourism expansion of the 1960s and 1970s was even faster in the Mediterranean countries, the case of Portugal being good example of that (see section 5.3.1).

As the world's tourism started to expand in the 1960s, showing how good business investment could be in this area, new entrepreneurs and investment started being attracted, and, thus, a number of developments started to mushroom worldwide. Pearce describes the way in which the tourism expansion of the last three decades changed the face of (previous quiet) areas of high tourism potential. In a section focussing on the 'processes and typologies of development', he 'travels' from forms of coastal tourism in places such as the Costa Brava, the Côte-D'Azur, the Black Sea and the Languedoc-Roussillon, to ski-field developments, such as those located in the French Alps, and also describes the impact of tourism on rural and urban areas (Pearce, 1989; pp.57-107).

European researchers in particular have published an amount of literature describing the way in which tourism has accelerated growth in many regions. As Pearce points out *many European researchers, particularly geographers, have laid greater emphasis on development processes than their American counterparts who have focused more on resultant impacts* (Pearce, 1989; p.58). Supporting this statement is, for instance, the comprehensive research conducted by Cooper in the Isle of Man (England) (see Cooper and Jackson, 1982; Cooper et al, 1987a; Cooper and Jackson, 1989).

As tourism started expanding during the 1960s and 1970s, a number of private and public sector organisations were attracted to the field. Private sector organisations were lured by the potential profit gained through operating equipment and infrastructure, such as transport, accommodation, attractions, catering, tour operations and travel retailing. Governments were motivated by the economic impact of tourism upon the balance-of-payments, income, employment, as well as by the indirect and induced investment and development created by the tourism economic multiplier.

It is within this scenario that the tourism industry started organising almost in an 'ad-hoc' way. The private sector ran projects where profit could be made; the public sector was concerned with coordinating and boosting the market in order to collect the maximum economic benefits produced by the private sector operation. Even if apparently developing different roles, private and public sectors worked in a complementary way, seeking the same objective: profit.

Unlike town planning where policies were (at least in theory, as described in section 2.3.1) looked at within 'rational' models and principles, such as the 'best' spatial organization and 'rational' strategies of development, most of the tourism planning policies set up in the 1960s and 1970s followed an economic rationale. In other words, they were designed away from the developments operated in its town planning counterpart (section 2.3.1).

Indeed, the WTO's report focussing on the 'Physical Planning and Area Development for Tourism in the Six WTO Regions' (WTO, 1980a; pp.20-23), concludes, from the analysis of 1,619 plans, that in the early 1980s *few forecast integrating tourism within the socioeconomic objectives for country development* and that *tourism plans where social aspects (had) priority over direct profitability (were) even more exceptional*. Other conclusions also illustrated the fact that even if *it (was) possible to observe an increasing awareness worldwide, environmental strategies (were) rarely associated with tourist policies*.

In terms of the legislative framework, it is also shown in the report that in the early 1980s *a legislative framework for tourism development plans (was) still to be prepared*, pushing physical planners to *the use of other existing legislation to enforce regulatory plans*. The WTO does not deny that *it (was) possible to observe a desire to plan, but few countries (had) been in a position to follow a policy of continuity regarding tourism development*. Looking at an explanation of such a situation the WTO suggests, among other problems, *a lack of continuity in preparing development plans for tourism; difficulty in ensuring the necessary coordination as relates to continuity between conception and implementation; and difficulty in coordinating at*

the national level such an amalgama of participants in the tourist development process (WTO, 1980; pp.20-23), as a result of the reasons introduced before (section 1.4).

Although implemented one decade before, more precisely in 1952, the Walt Disney plan may be used as an example of the way projects were put into practice by entrepreneurs as well as how they were viewed by the public sector in the 1960s and early 1970s. Another reason why the Walt Disney example is brought into this discussion is due to the fact that by reviewing literature it is easily possible to detect the absence of many examples of good practice in tourism planning in this phase, as also documented by specialized literature focussing on this matter (e.g., Inskeep, 1991; Gunn, 1988, 1994; Pearce, 1989; Baud-Bovy, 1982; Getz, 1986; Krippendorf, 1982), or in general literature providing insights into this topic (e.g., Murphy, 1985; Holloway, 1985; Burkart and Medlik, 1981; Heeley, 1981).

The Walt Disney's Disneyland theme park implemented in 1952 is indeed a good example of the 'ad-hoc' way in which most projects were put into practice in this period. Walt Disney's plan preparation was based upon two main concerns: site consideration and financing (Murphy, 1985). In a first phase, the plan focused on a rudimentary market assessment, looking for the way that supply had to be matched against demand. After this, the plan looked at the way in which the physical plant should be set up. The physical plant exclusively looked at physical considerations, namely in terms of the equipment and infrastructure design, and its scale exclusively covered the project area. Elder (1980, in Murphy, 1985) argues that Walt Disney's plan suffered subsequently from its limitations, such as looking at expanding the initial project into the surrounding area, as well as in controlling the spreading surrounding infrastructure and equipment that started mushrooming as a *'neon jungle' of motels, gas stations, restaurants, and other tourist support facilities*. Following Elder, these unpleasant side effects became afterwards *an artistic nightmare*.

Commenting on the way Walt Disney's plan was put into practice, and extending this criticism to the tourism planning approach followed in this period, Gravel (1979, in Murphy 1985) argues that by this time tourism was based on shorttermism. Planning was then about resort design, lacking comprehensive analysis, able to take into account the surrounding natural, social and economic environment. Hence, Gavel labels this phase as 'Operations Research'. He also mentions that up to the 1980s no refinements were brought into tourism planning, except the introduction of computer technology which permitted the analysis of more econometric data, *but which in itself was not a fundamental change in method for it was primarily a technical innovation*.

The Walt Disney plan illustrates the way projects were set up in this period. Plans were based upon a rudimentary market assessment and on physical prescriptions of equipment and infrastructures. Tourism planning was rooted on town planning (see section 2.2.1) but, however, without a specialized body of knowledge and techniques. In short, planning was mostly left in the private sector's hands, and the public sector's role was oriented towards indirect controls focussing on land use (zoning), natural reserves and countryside protection. The legislation used in tourism planning was thus that available in town planning, and therefore tourism planning was viewed as an extension of town planning.

As reported by the WTO (1980) such an approach was, nevertheless, inadequate to deal with the large size developments launched in the 1960s and 1970s, because it failed to address the surrounding environmental problems and to prevent the introduction of impacts into the destination areas. Therefore, this philosophy, based on indirect controls, showed its inadequacy, and strong criticism started to be raised against it.

It is indeed documented in literature published in the 1960s and 1970s that, at this time, tourism projects were put forward almost exclusively on an economic basis, emphasizing the participants' prime economic objective in the sector. In a literature review published by Mathieson and Wall (1982; p.35) it is shown that the 1960s and 1970s were dominated by the publication of literature *primarily (focussing) upon the economic aspects of the industry and this emphasis has resulted in a proportionally large number of studies of these effects*. This argument finds support in literature focussing on the economic impact of tourism at the international and national levels published, among others, by Peters (1969), Gray (1970), Thuens (1976), and the (few) tourism economic studies at the regional and local level published by Archer et al (1974), Henderson (1975), Vaughan (1977a,b), and Wall and Knapper (1981). The prominence of economic studies in this phase also supports the Jafari (1990) viewpoint when arguing that the 1960s and 1970s were dominated by the 'Advocacy Platform' supporters, who sought tourism almost exclusively on an economic basis (see section 1.4).

In spite of the undeniable importance of the sociocultural and environmental aspects in tourism planning, the 1960s and 1970s were characterized by the publication of little research in these areas. In the sociocultural field 'the causation theory of visitor-resident irritants' model developed by Doxey (1975), and Cohen's (1972) article focussing on the interaction between tourists and residents as a function of the different sociological forms of tourism ('the organised mass tourist', 'the individual mass tourist', 'the explorer', and 'the drifter'), are amongst the most relevant publications pioneering this field. Again, Mathieson and Wall (1982; p.133) provide a literature review of the sparse and scattered literature published in this area up to the 1980s. They claim that, in opposition to the 1960s and 1970s, a sociocultural approach has

started to emerge in tourism after the early 1980s, pioneered by the research conducted by academics such as Young, Jafari, Turner, Ash, Greenwood, de Kadt, Jud and Bryden, leading to the emergence of an alternative way of facing tourism. Following Jafari (1990), one may group these academics into the 'Cautionary Platform' (see section 1.4).

The environmental component in tourism was also strongly neglected in the 1960s and 1970s, *despite the ...preoccupation of scientists, politicians and the general public with the impact of man on the environment and despite the growing interest in tourism as a geographical, social and economic phenomena* (Cohen, 1978; p.217; in Mathieson and Wall, 1982; p.93). Like the sociocultural area, most of the environmental issues discussed in the literature published in the 1960s and 1970s, emerged in a very sparse and scattered way, as documented by the literature review provided by the OECD (1980) and Wall and Wright (1977) (in Mathieson and Wall, 1982; p.93). Again, it was only after the 1980s that the environmental problems started to be more systematically analysed. One may group the academics particularly concerned with this matter into Jafari's 'Cautionary Platform' (Jafari, 1990) (see section 1.4).

Despite the undeniable economic importance of tourism, it was realized in the 1980s that tourism should be viewed in a wider and more integrated way, encompassing at the same time economic, sociocultural and environmental aspects. The shift of emphasis in tourism planning since the 1980s may be explained in a threefold way. Firstly, the evolution of town planning showed the advantages of understanding planning in an enlarged perspective, encompassing at the same time economic, sociocultural and environmental aspects (section 2.2.1). In addition to that, and to a certain extent as a result of that, the guidelines arising from the Manila Conference (WTO, 1980b) called for the need to understand tourism planning from a systematic approach, based on the interaction of 'different' variables, such as economics, sociology, anthropology, environment, and so forth. Last, but not least, focussing on the situation of tourism planning in the early 1980s, the WTO drew attention to the fact that *from 1,619 plans only more than half of the projects (had) been implemented*. Moreover, the WTO concluded that *the fact that 43.5% of the plans conceived (were) failing to lead anywhere (indicated) the lack of continuity between conception and realization as relates to planning* (WTO, 1980a; p.21).

The 'Physical Planning and Area Development for Tourism in the Six WTO Regions 1980' report, published by the WTO (1980), is one of the most important and crucial research publications published in the tourism field up to the 1980s. Above all, the report established a bridge between tourism planning theory and practice. In particular, the report showed how theoretical desires (did not) worked in practice. Indeed, as mentioned above in relation to town planning, one criticism that is often raised against planning is about the usual gap between planning theory and practice. As noted above, it is claimed by several authors that if planning is

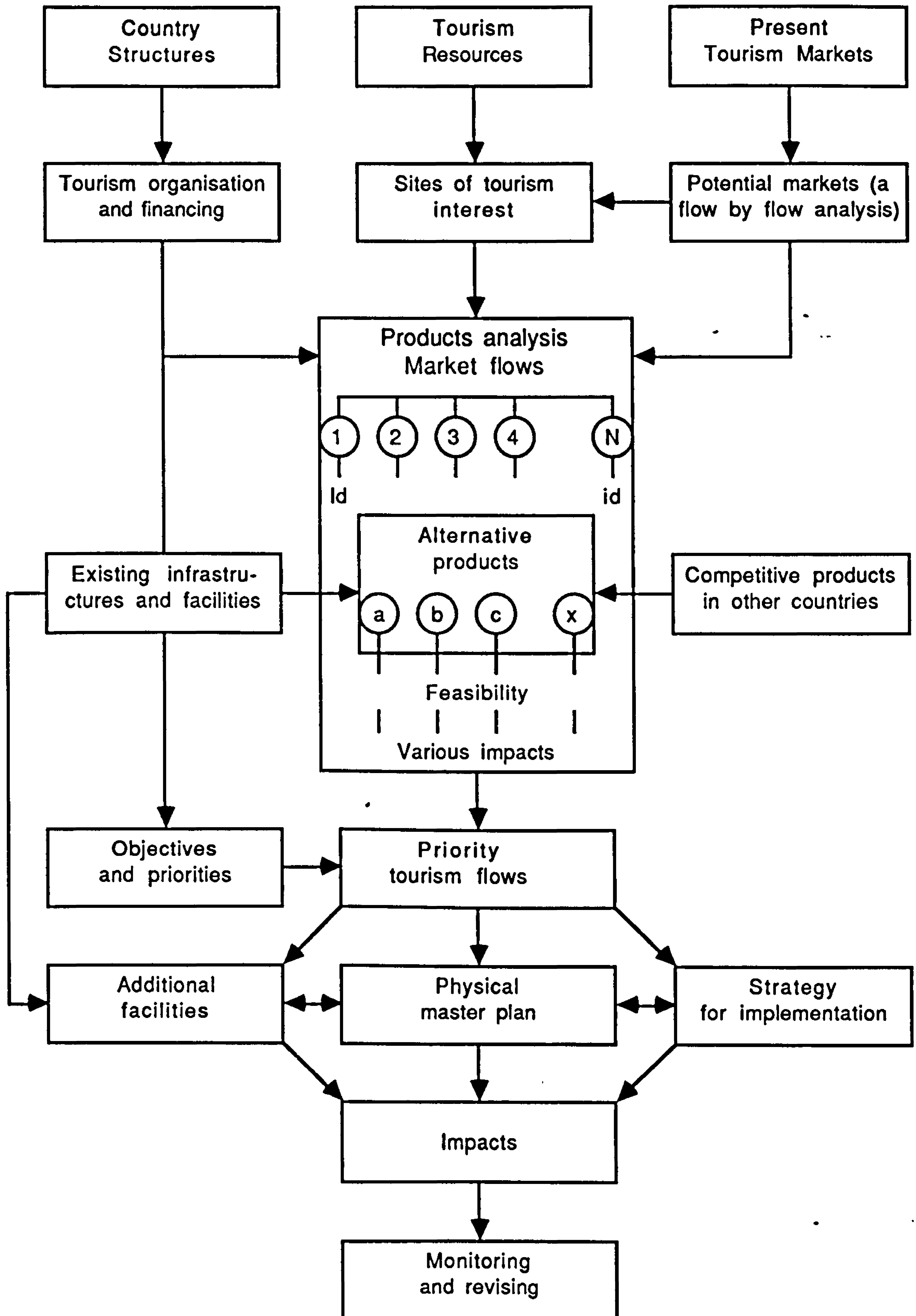
to succeed there has to be a closer relationship between theory and practice. In this regard, the report assumed an unquestionable importance, and it seems undeniable that tourism planning will most benefit in future if similar initiatives take place.

Furthermore, the publication proved the need, claimed before by several authors, for a shift in the way tourism planning was viewed, that is from an (narrow) economic to a (enlarged) systematic approach. Also, the report was responsible for attracting growing numbers of researchers into this field, who started developing alternative proposals for tourism planning, as documented by the research published, among others, by Baud-Bovy, 1982; Krippendorf, 1982; Getz, 1986; and Choy, 1991.

As discussed before, the beginning of tourism planning was based upon plans and/or strategies mainly concerned with market assessment and plant site. Such plans were often used to serve speculator's interests, instead of being used to control the development process. Based on that as well as on the outcomes from the 1980 WTO report, Baud-Bovy (1982), in an article entitled 'New concepts in planning for tourism and recreation', suggested a break from the former approach, proposing, instead, a new integrated idea for tourism planning. Baud-Bovy claimed that most of the planning failure of previous years was linked to two main causes: the lack of physical considerations and deficiency in economic analysis. As an alternative he developed a systematic planning approach, based on an integrated form of planning. By 'integrated planning' he meant: integration into the nation's policies; integration with the physical environment; integration with the sociocultural traditions; integration with the related sectors of the economy; integration into the public budget; integration into the international tourism market; and, integration with the structure of the tourism industry. To put his ideas forward he reinstated the model developed together with Fred Lawson five years before (Lawson and Baud-Bovy, 1977), published under the description of PASOLP - Product's Analysis Sequence for Outdoor Leisure Planning (figure 2.5).

Baud-Bovy's model was developed on the basis of two main findings: the results published by the WTO and the developments operated in town planning. In particular, the WTO (1980a) showed that the tourist planning approach adopted in the 1960s and 1970s led to the failure of a number of plans, and, thus, called for a new tourism planning approach. Besides, the developments operated in town planning (section 2.3.1) suggested, in a similar way, that since evolution is not based upon linear and deterministic reasoning but instead on the influence of a multifaceted interaction of variables, planning solutions should be looked at in a comprehensive way. The PASOLP model emerged within this context and attempted to give a new direction to tourism planning, moving its emphasis from an economic rationale to an interconnected view of

Figure 2.5 - Diagrammatic representation of the PASOLP approach



Source: Baud-Bovy (1982; p.312)

the system, where the economic rationality is looked at in terms of a country's political organization, tourism organization, financing, and existing infrastructures and facilities.

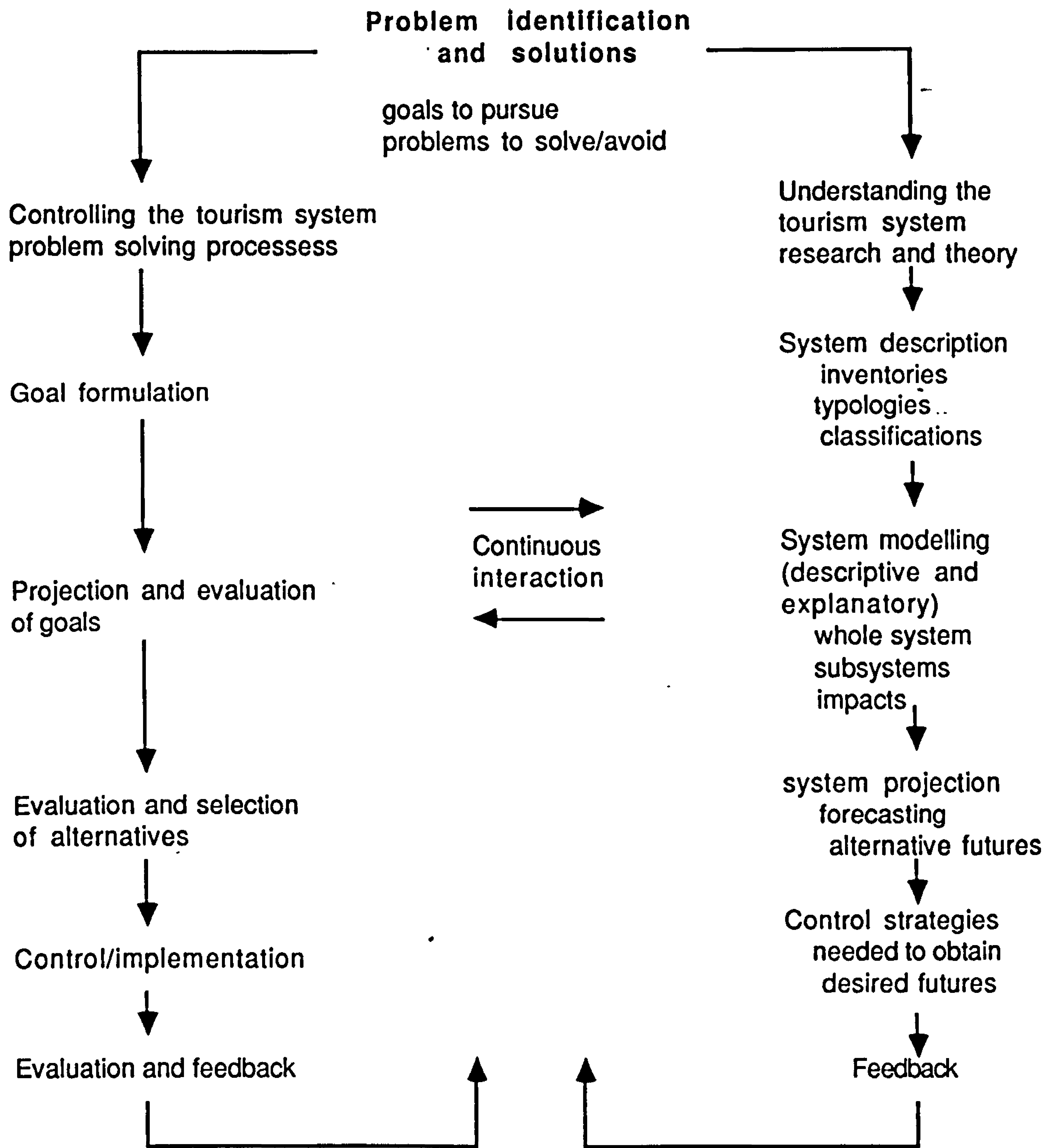
The philosophy introduced by the PASOLP approach found wide consensus among planners, and its philosophy was afterwards followed and expanded by other researchers. For instance, Getz (1986) adapted to tourism the systematic model created by Charles Chadwick (figure 2.3), suggesting, in a similar way to Chadwick, that a systematic approach could be used in tourism planning (see figure 2.6).

Again, the systematic approach developed by Getz is based on the assumption that systems are based on an interconnected amalgam of variables, and, therefore, plans should be looked at combining elements of planning theory (represented on the left branch of the chart) with planning/management process or method (right branch).

With the development of the systematic approach in tourism, here represented by Baud-Bovy's and Getz's models, it is undeniable that tourism planning has moved from a narrow economic perspective towards a corporate one based on 'integrated planning'. This situation is well documented by growing literature published since the 1970s, that, based more or less on the systematic approach but never losing from sight the need for viewing tourism in an integrated way, was put out by academics such as Chen (1975), Mill and Morrison (1985), Pigram (1990), Witt and Gammon (1991), Inskip (1991, 1994), Curry and Morvaridi (1992), Klem (1992), and Gunn (1988, 1994).

Again, comparing tourism and town planning development one may say that while an approximation between these two fields, in terms of the way in which systems were understood and solutions found, may be noticed, it is also undeniable that tourism planning seemed to be pushed by its town planning counterpart, but at a slower pace. In other words, town planning inspired changes in tourism planning. However, when in the 1980s town planners reached the conclusion that the 'purist' systematic approach could not be achieved due to the criticisms mentioned before (section 2.3.1), tourism planners continued to back it without criticizing the principles underpinning this philosophy. To put it more simply, in the 1980s town planners understood that rational approaches were likely to fail because rational planning was based on wrong premises (section 2.3.1). Despite that, many tourism planners, in the early 1980s, were still defending rational approaches without criticizing their foundations. Some exceptions to that may be found in the work published for instance by Murphy (1985) and Mill and Morrison (1985), where the seeds that had inspired town planners before about the need for more strategic and community approaches, also started to influence academics.

Figure 2.6 - Integrative systems model of tourism theory and practice



Source: Getz (1986; p.29)

The reasons for the slower way in which tourism planning has evolved over the last decades seem to be twofold. First of all, because tourism planning in the 1960s and 1970s was dominated by economists, there was a small number of physical planners specializing in tourism. Hence, site plan was used as a tool for implementing economic objectives. Accordingly, physical solutions were found within town planning knowledge, without a significant demand for a specialized body of tourism planners interested in the physical component. With regard to this Torkildsen (1992; p.132) claims that *the problem with planning*

... is that, generally speaking, the planning profession knows very little about leisure while the leisure profession knows very little about planning. With some honorable exceptions planners have tended to ignore leisure because they have had more pressing issues such as transport, housing or shopping to deal with. The leisure professions have ignored planning because they have been primarily concerned with management - the day to day operation of facilities and services. It will also be shown in chapter 5 that even in countries where tourism is among the most important economic sectors, such as Portugal, tourism is viewed with minor priority among local authorities. In fact, only a few 36% of the municipalities are represented in the regional tourism boards by presidents, while the remaining 64% of the seats are held by vice-presidents (see table 6.2.a)

In second place, tourism research and literature in the 1970s remained almost in its infancy. While it is easily possible to find in this phase authors focussing, for instance, on tourism history, structure and organisation of tourism, tour operations and retailing; aspects related to economics, sociocultural and environmental impacts of tourism as well as issues linked to planning and development did still remain viewed in a general way, suggesting a lower level of maturity of the tourism planning field. This explains why Cooper et al (1994, unit 2.2) argue that because of the lack of enough quality material the study of 'tourism proper' has given place to courses on 'tourism as an application' and 'vocational training for tourism'. Such a situation is well documented by some findings published by Jafari (1990). Researching in the subject of doctoral dissertations in the 'Dissertation Abstracts International' he found only 157 PhD research works focussing in tourism in the period concerning 1951-87, from which 83% were conducted between 1971-87. In addition to this, most research was oriented towards economics (40 references), anthropology (25), geography (24), recreation (23), business administration (11), and education (9). Among the most under researched matters he found sociology and urban and regional planning (7), political science (5), and fine arts, social work, theology, history, mass communication and public relations, all with only one reference.

Indeed, in spite of a flourishing literature reviewed in the article 'Travel and Tourism Sources of Information' published by Goeldner (1987), Edward Inskeep in a paper entitled 'Tourism Planning: An Emerging Specialization' claims that *the planning of tourism as a distinct activity requiring a particular body of knowledge and a systematic technical approach is a relatively new specialization in development planning. General planning literature carries little reference to tourism planning, and it is not yet being taught as a separate subject in university planning departments* (Inskeep, 1988; p.360). The situation of Portugal is good example of that since, in spite of the strategic importance of tourism to Portugal (see chapter 5), the first degree ('licenciatura') in tourism planning and management was launched only in the late 1980s in the University of Aveiro (Central Portugal).

By reviewing the literature published in tourism planning Inskip also shows the lack of literature on techniques, principles and models of comprehensive tourism planning, only available in the research published (and sometimes reedited) by the WTO (1977), Lawson and Baud-Bovy (1977), Kaiser and Helber (1978), Gunn (1988), Pearce (1989), Murphy (1985), Ritchie and Goeldner (1987), or in some general literature with particular sections in tourism planning, such as, Lundberg (1980), Burkart and Medlik (1981), Gee et al (1985), McIntosh and Goeldner (1986), Pigram (1983). To these references one may now add Inskip (1991, 1994), Gunn (1994), Laws (1995), Croall (1995), Cooper et al (1993), and Witt and Moutinho (1989).

It is within this scenario of tourism planning maturation, to a great extent due to the publication of new literature and the attraction of new researchers into this field, associated with the evolution of town planning philosophies, that tourism planning has evolved since the 1980s. Leaving behind the excessive influence of economics, tourism planning reached the early 1990s with a higher level of maturity, as well as having been influenced by the socioeconomic ideals spread by neo-liberalism. This is what is analysed in the following two sections.

Finally, it should be pointed out that, as far as the Portuguese situation is concerned, the evolution of tourism planning and industry during the rational planning period followed a different rationale of the one observed in countries such as England and the USA. With regard to this, it will be seen later that political motivations influenced decisively the way in which the development process took place in Portugal up to the 1970s. However, that is a subject for an expanded analysis in section 5.3.1.

2.4 Planning after the 1980s (an emerging planning paradigm?)

2.4.1 Town planning

As discussed before, planning was severely criticized in the late 1970s and during the 1980s, and its credibility was strongly questioned (section 2.3.1). Two main reasons were then found to support this criticism: internal problems related to the planning theory and practice, and external problems which emerged from the socioeconomic changes operating in the world, and, particularly, in Europe and in the USA.

The rational planning paradigm developed during the 1960s was subject to strong attacks. It was found that the principles underpinning rational planning were highly questionable. It was

proved that planning matters could not be addressed in a scientific way, because they overlap, for instance, politics, where decisions are often not taken according to the rational principles claimed by planners. It was also found that many of its premises were not supported by practice, since things such as 'neutrality', 'unitary public interest', 'protection of lower income groups', and 'income distribution', were highly questionable in a market economy context, and also failed to be proved in practice. Brindley et al (1989) argue that such situations led planning to be excessively *opposed as a sham by academic and political opposition, and planners appeared as charlatans in the pockets of the property development industry.*

In addition to this criticism, the late 1970s and the 1980s were characterized by the emergence of new liberal philosophies. Neo-liberalism emerged in the 1980s linked to Reaganism, Thatcherism, and the EEC/EC (now EU). Hence, a move has been operated in a number of Western countries from a welfare state philosophy, typical of the 1960s and 1970s, towards a liberal approach. The time for planned economies seems over and, consequently, the last two decades have assisted the flourishing of liberal governments in Western countries as well as in the former communist nations. Most of the Social-Democrats, Christian-Democrats, Conservatives or even Socialists that have ruled Europe for the last two decades, have adopted market approaches, shrinking substantially from former interventionist state role. The restoration of the democracy in April 1974 and the membership of the EU (1986) are also evidence of the evolution of the Portuguese economy towards market approaches (see section 5.2.2).

This significant pull out of the state from markets, leaving them to automated mechanisms, *in order to relieve 'productive' private sector organizations of the burden of supporting the 'parasitic' public sector* (Boyne, 1993), has also reduced the direct capacity of the governments to intervene in them because tax receipts have also decreased (state's 'fiscal crisis'). Indeed, neo-liberalism has been characterized by the emphasis put on market mechanisms as well as on individuals (unitary consumers) as supporters of capitalism.

In addition to this, the role of the individual has been fueled as a result of what has been named the 'revolt of the citizens', since they have started reacting against the (bad) quality of services and products provided by the 'welfare state' (McDougall, 1990). Meanwhile, there has been an internationalization of economy, comprehending areas that spill over national borders. Such a situation has been boosted by the creation of transnational alliances such as the EU, NAFTA, MERCOSUL, GATT, EFTA, etc (for an expanded analysis see section 3.3.3).

Furthermore, new emphasis has been put on local level organisations, because it is believed that they are better placed to interact more closely with people and markets (Cooke, 1990a; Cooke,

1990b; Albrechts, 1990; Stoker, 1988; Stoker and Young, 1993; Campbell, 1990; Hollis et al, 1992). That is, what has been noticed over the last two decades is the creation of conditions allowing planning to become more flexible and closer to people. This will in particular be documented in the two following chapters, when analysing the way in which a number of organisations have changed their structures to adjust to the new framework created by neo-liberalism. The discussion about the renewed importance of regional level structures (section 3.3.5), and the development of horizontal approaches (section 3.3.6), brings fresh evidence for this.

Recent developments in planning have therefore operated within this context. Particularly in England, where the neo-liberal wave has been felt with stronger intensity, planning suffered strong attacks from Conservative governments and, as a result of this, has started changing. Among others, McDougall (1990) and Brindley et al (1989) point out the following main changes introduced into the British planning system over the recent past:

- Traditional instruments of planning, e.g. structural plans, were weakened or relaxed;
- At national level planning was restructured to accommodate property interests and to support the market and profit more effectively;
- More emphasis was put on local planning to support the expansion of market approaches;
- New organizations such as Enterprise Zones, Urban Development Corporations, Development Control League Zones, Unitary Development Plans, and Special Development Orders were set up.

It is difficult to evaluate the impact produced by neo-liberalism on planning, when divergent opinions have been raised by different sectors. While Conservative governments argue that such changes were necessary for bringing it closer to markets and to 'speed-up' the development process (Montgomery and Thornley, 1990), others claim that they brought about the *dismantling of the planning system along with many other parts of the welfare state*, bringing instead *chaos* (Ravetz, 1986). Some supporters of the second point of view go even further along this criticism, arguing that *it is time to write the (planning) obituary* (Ambrose, 1986), and also accuse Mrs. Thatcher of *breaking things up, but not replacing them with anything constructive* (Montgomery and Thornley, 1990). The impact of Conservative governments on the planning system has been so strong that Harris (1994, p. 393) points out that *the political trend away from planning (...) has led some planners to try to redefine (it) in terms of management*, in accordance with the discussion introduced in the previous chapter (section 1.5)

Though it is important to notice the existence of different opinions about the same phenomenon, because that helps science to evolve (see Kuhn, 1970), it is nevertheless undeniable that some of the most extremist arguments used by planners on this matter have involved a great deal of arrogance and lack of preparation for being criticized, calling to mind some of the attitudes adopted in the 1960s and 1970s when planners saw themselves as 'helmsmen' and 'rational actors' (section 2.3.1). In other words, in putting forward such criticisms some planners give ammunition to those who attack the 'premature legitimization' of planning without showing its validity through practice (see Reade's (1982) comments introduced in section 2.3.1).

Indeed, what seems to be happening is a process of 'normal science' evolution common to many other fields. A book published by Kuhn (1970), entitled 'The structure of scientific revolutions', illustrates that science is a continuous replacement process of paradigms (which is the case of the replacement of 'blue-print' planning by rational planning). Kuhn argues that the establishment of a new paradigm is accompanied by two situations: *(i) achievements sufficiently unprecedented to attract an enduring group of adherents away from competing modes of scientific activity; (ii) Achievements sufficiently open-ended to leave all sorts of problems for the redefined group of practitioners to resolve.*

The rational paradigm which emerged in the 1960s was able to group the scientific community around it, because it advocated the need for introducing more rationality in planning decisions and the need for broadening the spectrum of sciences used in the decision-making process. However, research carried out meanwhile has shown the strengths and weaknesses of the rational approach. Besides, rational planning had only been 'tested' before under Leftist governments. The emergence of Right-wing governments has created new circumstances never experienced before. So, what nowadays is happening is the emergence of a set of weaknesses, for which new ideas have to be developed and new planning forms invented. Amongst the first academics following this approach are Sorenson et al (1983) proposing *a new-conservative approach, seeking to prescribe a basis for planning within the traditions of free-markets, the rule of law, and skepticism towards government intervention* (in Hague, 1991)

In accordance with this argument is possible to find academics such as McDougall (1990), Healey (1990), Faludi (1987), Brindley et al (1989), and Darke (1990), who argue, against some radical viewpoints, that Thatcherism did not reject planning but, instead, imposed a new approach more oriented towards the market. Brindley et al defend the idea that *the premature death of planning* is only in the head of some more extreme authors, because *planning is still being practiced and there has been no major reform of the Town & Country Planning Acts of 1968 and 1971*. Conversely, they argue that *what has been happening ... is a revision of the existing system, often involving (paradoxically) state intervention and public expenditure.*

In addition, they draw attention to the paradox between conservative governments and their practice. Recently, Michael Portillo, a British Conservative Secretary of State, pointed out the need for shrinking the state's role because *the state is too big ... is trying to do much (and thus) the state has almost confiscated ... the sense of responsibility towards others* and thus warning that *the Government may opt out of some areas of state support* (Portillo, 1993a,b). In opposition to this rhetoric Brindley et al defend the view that Thatcherism has created highly interventionist bodies such as the Urban Development Corporations.

Thomas and Kimberley (1995) also notably point out, in an article entitled 'Rediscovering regional planning? Progress on regional planning guidance in England', that though a former Conservative government decided in 1979 to abolish the Regional Economic Planning Councils, under the auspices of Margaret Thatcher, other recent, and also Conservative, governments rushed to establish Regional Planning Guidance strategies (RPG), in order to fill the vacuum left by the Regional Economic Planning Councils (for an expanded analysis see also Thomas, 1994; Memon and Gleeson, 1995; McLoughlin, 1994; Mawson, 1993; Clarke, 1994; Harris, 1994; Alexandre, 1994; Breheny, 1991).

It is nevertheless undeniable that conservative government attacks on planning led, in the 1980s, to the 'fragmentation' of its theory, a situation that has almost remained unchanged up to the mid-1990s, even if new ways of putting planning forward have meanwhile been suggested in literature. 'Fragmentation' is understood here in the sense that while before there was a prominent planning school centered on rational planning (see section 2.3.1), the 1980s saw the proliferation of different ways of facing planning theory and practice, away from the 'consensus' reached years before.

Brindley et al (1989) found six main different planning philosophies operating simultaneously in the late 1980s:

(i) Regulative planning: adapted to changed circumstances

It is based on the classic planning forms. This way of planning is predominantly regulative, and the planner emerges as an expert in urban systems supporting decisions through 'scientific' reasoning. Despite all criticisms it remains very significant and all the tools of the system are essentially geared to this end.

(ii) Trend planning: streamlining the system

This type of planning is characterized by following the private sector developments. Planners are frequently subordinated in their dealings to property companies and developers. Planning tends to support private investments rather than direct them.

(iii) Popular planning: reviving the community

This form of planning finds its roots in the popular movements operated in Britain, when local communities started opposing large scale developments designed at national level without their involvement. It defends the policy of including people in the decision-making process, and is particularly associated with a new emerging concept of municipal socialism.

(iv) Leverage planning: stimulating the market (or 'entrepreneurial planning' as defined by Stoker and Young, 1993, p. 37)

Is based on the idea of market stimulation through public sector investment in less profitable areas. Action is geared towards both direct subsidies to the private sector and public-private partnership. It has been developed by conservative governments through the Enterprises Zones.

(v) Public-investment planning: directing urban change

It is argued that in some areas recovery is only possible through massive public investment programmes in infrastructure, services and urban facilities, because the private sector is generally unable to do that. Emphasis is on the public sector, comprehensive planning at all levels, good coordination among all participants, and adequate forms of funding. Even if it is typically welcome by the Left, several conservative governments have adopted it.

(vi) Private-management planning: handing over to the private sector

It defends the view that recovery should be brought about by massive state intervention, leaving all the management processes to the private sector. Tasks are pursued within a public framework, but all achievements are reached by private management of public policy.

Commenting on these different planning attitudes, Brindley et al argue that in future planning will be dominated by the three last approaches. That is, the emphasis will be on market-led styles, in places where the private sector is able to lead the development process, by directly involving the public sector in areas not attractive to private sector organisations as in less

developed and lagging regions. This point of view is also shared, among others, by McLoughlin (1994), Harris (1994) and Memon and Gleeson (1995).

What has also been noticed over recent years is the fact that the experience of pure market-led approaches suggests that *a planning free-for-all is neither politically feasible nor commercially desirable*. For example, *while seeking flexibility within a system of planning control, the house builders have come to recognize publicly the advantages of limiting market conditions ... The House builders Federation have criticized the government's Green Paper on development plans, arguing instead for a new tier of strong regional planning* (Brindley et al, 1989).

Indeed, it has been pointed out in literature that an excessive planning relaxation may introduce negative side-effects that contribute neither to balanced developments nor to private sector profit (see Bishop et al, 1994). For instance, Montgomery and Thornley (1990) claim that the extreme market-led approaches developed in some economic sectors in the 1980s have led to the reduction of green space (some have even been sold off), deterioration of infrastructure and services, growing infant mortality, closing beaches due to sewage contamination, etc. Also, excessive planning deregulation and relaxation has led to increasingly congested roads and motorways; the housing market has become a game of roulette, zoning relaxation has led industry to start locating in non profitable areas, and, generally speaking, the market has started working for the benefit of speculative interests benefiting speculators rather than investors. In opposition to this, Berry and McGreal (1995) draw attention to some good results of the British inner city regeneration, in which symbiotic relationships involving private and public sector organisations (e.g., partnerships, inter-agency coordination and community involvement) may bring renewed hopes to avoid such situations.

Commenting on the changes introduced by the market-led approaches in the 1980s Bishop et al (1994, p. 11) and Beesley and Littlechild (1994, p. 21) also recognize that most states are reducing their control in the running of firms. However, they also believe that most states are also increasing their sphere of influence in other matters. With regard to this, they give the example of the growing number of organisations which were established in Britain in the recent past, with the aim of controlling newly privatized utilities (e.g., the Office of Fair Trading and the Monopolies and Mergers Commission).

The criticism raised against the neo-liberal philosophies which emerged in the late 1980s has also stimulated a renewed interest in matters linked to the welfare state, but now addressed in a market context (see Wolf, 1990; King, 1986; Boadway and Bruce, 1984; Thirlwall, 1989). A growing literature focussing on the emergence of 'localism' in modern society has also been noticed, proving that this trend will remain in the planners' agenda in forthcoming years (see,

for instance, Hollis et al, 1992; Stoker and Young, 1993; Bennett and Krebs, 1991; Stoker, 1988; Barr, 1993; Lichfield, 1988; Healey and Williams, 1993; Burrows and Loader, 1994).

It is however particularly important to outline that such tendencies are not viewed in literature as a return to the past. Conversely, they are understood as a 'back to the future' (Rosa Pires, 1991). From the above literature a general consensus emerges that planning may develop a crucial role both in promoting quality of life and boosting markets. Nevertheless, it is also assumed that such strategies must be achieved by direct and simultaneous involvement of both public and private sector organisations. In other words, the new planning approach *combines deference to market forces with a package of limited planning controls and public subsidy* (Brindley et al, 1989). Strategies are designed in public-private partnership, and the implementation process is left to the private sector (see Bennett and Krebs, 1991; Berry and McGreal, 1995; Hutchinson, 1994). In less attractive areas, the initial investment in infrastructures and services might have to be provided by government. However, that should be viewed as a boost, and planned for achieving further self-sustaining development processes.

Focussing in particular on the British situation Clarke (1994, p. 637) points out that *in the mid-1990s it is difficult to avoid the conclusion that the welfare state is not what it was. Wherever one looks, things have changed - whether it is internal markets in the NHS, the shift away from local authority provision of public housing, the introduction of local management schools, the promotion of a new mixed economy of welfare in social care or the replacement of unemployment benefit by 'job-seeker's allowance. Knowing that things are different is not one thing, but the tasks of defining the direction of these changes and explaining them are more challenging.*

Without assuming the pretentious, and also gigantic, task of attempting to do what many others have failed to achieve, one may, nevertheless, point out, based on an extensive literature review, the following six main issues that are likely to dominate planning in the forthcoming years. Focussing on the Portuguese situation further chapters will examine whether such issues have been taken into account by the tourism organisations in the planning of tourism at the regional level (see chapter 5).

First of all, planning in future will be based on informed solutions and will take place at all levels of organizations. This new approach is documented in Alvin Toffler's books *The Future Shock* (Toffler, 1970) and *Power Shift* (Toffler, 1990). Toffler argues that there is at present a swing away from the traditional forces of development typical of the pre-Industrial Revolution and post-Industrial Revolution periods, that is *violence* and *wealth*. In opposition to this he argues that dominance in future will be based on *knowledge*.

To a certain extent this represents the recuperation of the rational paradigm essence in terms of looking for 'rational' decisions. However, the role of the planners changes substantially, because within this framework planning is understood as a spread activity undertaken at all levels of organizations ('planning clusters') and will no longer be the exclusive responsibility of planners. In this context, future planning will be mostly based on 'corporate' or 'ad-hoc' planning. Habermas (1981, in Healey, 1990) also supports this argument by commenting that *our modern world ... represents a sophisticated realization of the hope of the enlightenment, suffered by forms of collective action guided by knowledge and action*. In other words, nowadays the question is how to allow idea to escape from institutional bounds (Healey, 1990), i.e. how to escape from dominance in our present structures (Forester, 1989). This point of view is also shared by Lock (1988, p. 27) when he argues that what planners do need in future is *flexibility and invention in the way (they) work*.

However, it should be noted that such tendency has found (sometimes strong) criticism among some academics who argue that this will lead to the dilution of the role of the planners, and planning, as a science, may even disappear in future (for an expanded analysis see Faludi, 1987). Nevertheless, evidence has suggested that such a situation is not exclusive to planning but typical of other sciences, such as architecture, engineering, management, and public administration. In these areas curricula have also expanded through the inclusion of other disciplines and spread their action through several levels of administration. Faludi (1978) views this *typical in action-oriented disciplines where there is not a special interest in knowledge 'per se' but in harnessing whatever knowledge is needed to achieve these ends*. In other words, this approach is common in 'The Sciences of Artificial' (Simon, 1969).

Resulting from the first one, a second main issue which will increasingly be brought to the planners' agenda in the forthcoming years is about the way in which organizations will start organising their operations. In a post Fordist phase there will no longer be a place for heavy top-down structures and centrally planned decisions (Healey, 1990). Decisions must be taken in an up-side-down flow of information, where all organisations must be heard and involved in the decision-making process. In future, progress and competitiveness will be based on the capacity of organisations to read the surrounding environment and design policies able to respond accordingly.

Besides, in today's world there are growing numbers of organizations collecting information and getting involved in planning (e.g., environmental groups, economic lobbies, special interest groups such as heritage, culture, sports, etc). Therefore these groups must be brought into the planning process for two main reasons. To start with, it does not make sense to create

large (often ineffective, inefficient and expensive) structures collecting data, when such information is already available in other places. Also, these groups may provide information able to enrich the decision-making process and lead to better, more informed and accountable solutions and consensus.

Roberts (1974) supports this argument by stating that *lateral thinking* among organizations will become crucial for planning in future. According to her, competitiveness will be tied to the way in which organisations produce informed scenarios and rapidly adapt their strategies to a changing environment. Such an argument has found growing support in literature published since the early 1990s, as particularly well documented by Ohmae, 1995; Hammer and Champy, 1995; Handy, 1994; Jarillo, 1993; Cappellin and Batey, 1993; Marin and Mayntz, 1991; Rifkin, 1991; and Knoke, 1990.

The two following chapters provide an expanded analysis of this issue. The discussion will be directed towards the way in which organisations adapt their operating philosophies according to the changes which take place in the surrounding environment, and will also be shown how most of the bureaucratic top-down structures set up after the Industrial Revolution are no longer adjusted to reality (chapter 3). Nowadays most organisations demand flexibility and horizontal coordination. With this in mind, chapter 4 introduces a proposal based on the webs of organisations. The situation observed in the Portuguese tourism administration, described in chapters 5 and 7, will, nevertheless, show that there is still a long way ahead to go in this area, since most administrations are still anchored on principles which are no longer adjusted to today's reality.

Another main variable that will influence the planning activity in forthcoming years is public participation. As discussed before (section 2.3.1), public participation was attacked by some academics and practitioners during the 1970s, since some participatory processes may be used to revert decisions in favour of the stronger.

There is a growing literature (see in particular Healey, 1990 and McDougall, 1990) which shows that this matter will remain on the top of the planners' agenda in future, on account of the following reasons. Firstly, the knowledge brought from the general public may introduce new ideas into the decision making-process and, thus, may enrich planning solutions (Forester, 1989). Also, the actual tendency seeking to choices from informed solutions, as argued in the first point, is linked to the need to bring public opinion into the decision making-process. Yet, the citizens' importance was recognized during the 1970s and 1980s due to the bad quality of services provided by a number of public sector organisations ('revolt of the client') (section 2.3.1). Such a situation has been very contributory to the enlarged role that they have

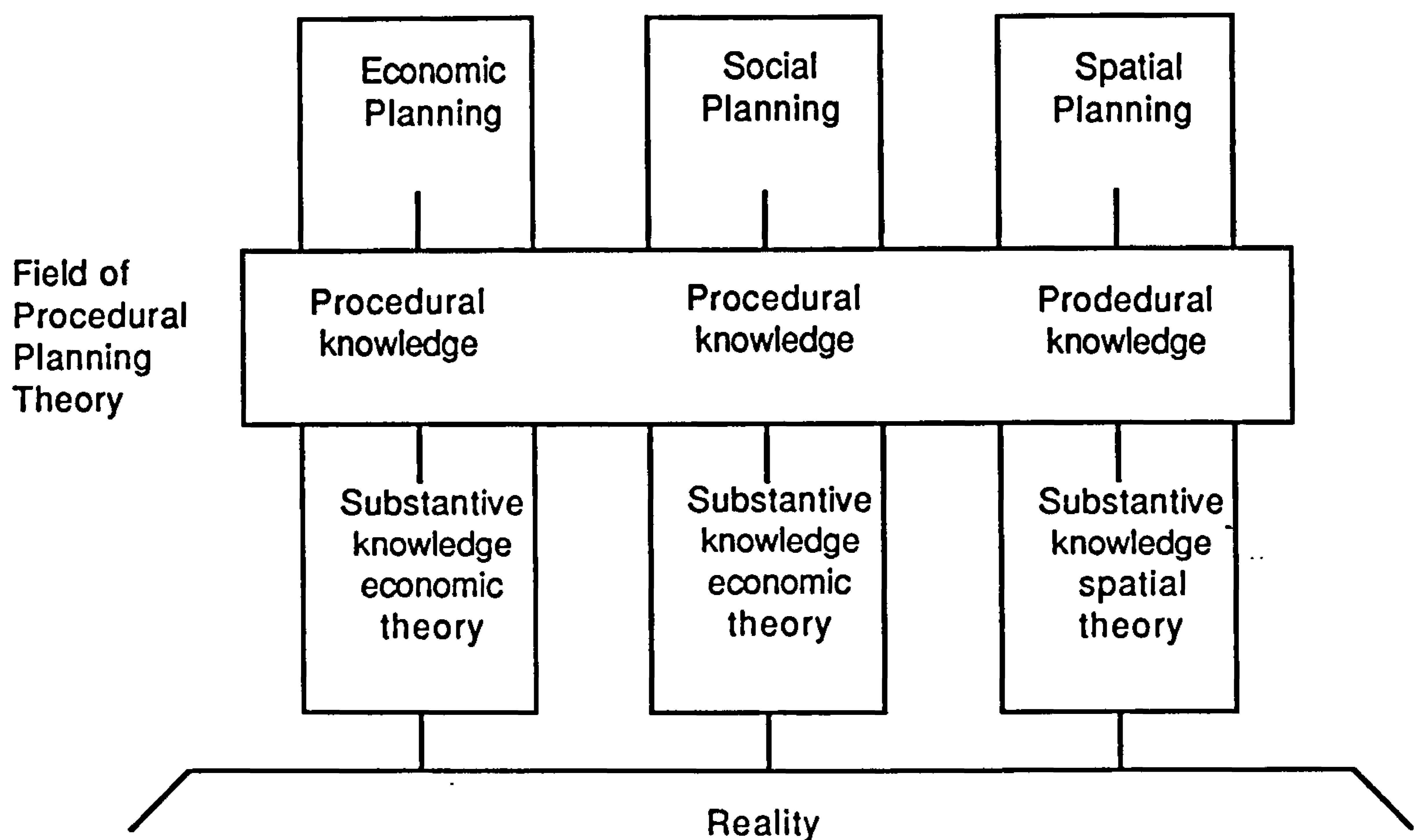
nowadays in society. Furthermore, politicians have a democratic base enabling them to select options but planners do not. Hence, public participation might be used for democratizing planning decisions. Finally, the tendency introduced by neo-liberalism to put individuals in the market centre has encouraged 'localism' to emerge. This has led to the creation of higher interventionist individuals, with a higher level of awareness about issues, such as quality of life, ecological problems, etc.

As a result of this, it is believed that the role of the individual will continue to grow. That is, it is believed that planning in the future will be based on 'intermediation', and also that solutions will increasingly be 'invented' through practice (Healey, 1990). This new planning style is often labelled in literature as 'popular planning' (Darke, 1990a, 1990b) or 'planning through debate' (Healey, 1990). Based on the Portuguese situation chapters 5 and 7 will, however, show that, again, there is still a long way ahead to go in this area in order to match theoretical desires with the planning practice undertaken by the vast majority of the planners.

A fourth main issue which will dominate future planning is associated with the need to create more pragmatic approaches. Healey (1989) argues that emphasis has been shifted from questions such as 'what', 'why' and 'who' to 'how'. To put it in a different way, planning is based on a mix of 'procedural' and 'substantive' knowledge (figure 2.7) (Faludi, 1978). 'Substantive' knowledge is about the variables involved in the planning process, while 'procedural' knowledge is linked to the ways of tackling the problem.

Owing to the fact that most states have reduced their role in society, they also deal with shorter budgets ('fiscal crisis') (section 2.3.1): Therefore, policies have to be designed within smaller budgets. In addition, and as discussed above, solutions have to be found and monitored more rapidly, since competitiveness has today become an important issue. This situation has led to a wide discussion concerning the way in which plans should be put into operation. During the 1950s and 1960s, emphasis was placed on 'substantive' analysis, since time and money were not then viewed as a major problem. Therefore, plans used to start with the 'analysis of the situation', by collecting and compiling large amounts of information. However, it is nowadays argued (Faludi, 1987) that plans should begin with 'procedural' knowledge, that is with the 'analysis of the problems', because of the economic restrictions and operationally mentioned before. It is also argued in literature that by following this approach plans are likely to become more realistic and, thus, not so much *products of fantasy* (Faludi, 1987).

Figure 2.7 - Relationship between procedural and substantive knowledge in planning



Source: Faludi (1978)

A fifth main issue which is playing a prominent role in planning is the new relationship established between public and private sector organisations. As discussed before, most of the intervening capacity of the state seen in the 1950s and 1960s has been lost, because nowadays governments deal with smaller budgets. Such a situation has had important consequences in the way states intervene in society. Indeed, what has been observed in this post Fordist phase of *disorganised capitalism* (Hague, 1991), is the fact that planning is increasingly assuming a coordinating role of private sector investments (Healey and Williams, 1993). In other words, there has been a shift from 'normative' to 'strategic' planning. The growing number of partnership schemes involving public and private sector organisations is a good example of this. However, it will be seen later, based on the Portuguese situation, that most strategies are still being set up based on little inter-organisational coordination of policies, since most planners act in isolation from other organisations (see chapter 7).

Finally, another main issue that will influence planning in future is the world globalization. Nowadays a number of companies establish privileged relationships on a transnational rather than on a national basis (see section 3.3.3). Such a situation has been fuelled by the development of a number of international treaties, such as the EU, NAFTA, MERCOSUL, EFTA, GATT, etc. In particular in Europe *the primacy of nation states (has been) challenged by*

internationalism (Hague, 1991). The EU federalist philosophy has led to the passing of several pieces of legislation by members states in areas such as the environment (e.g., EIA) and regional and rural development (e.g., legislation passed under the ERDF, EAGGF and EIB), a tendency which is likely to expand in future to many other economic and social fields. There is a growing belief that the *EU cannot expect to transform national legal systems and local political cultures by direct intervention. But it can influence their development by its policy debates, the criteria used for funding programs and, where regulation is required at the European level, in the way regulatory requirements are specified* (Healey and Williams, 1993). Taking into account that the world globalization has important implications for the way in which organisations should be restructured, this thesis will return to this issue in section 3.3.3.

2.4.2 Tourism planning

After having analysed the way in which town planning evolved in the last fifteen years and is likely to progress in the future, it is important to provide now an insight into the way in which the tourism industry evolved during the same period in order to understand why growing numbers of governments have placed great importance on the tourism sector.

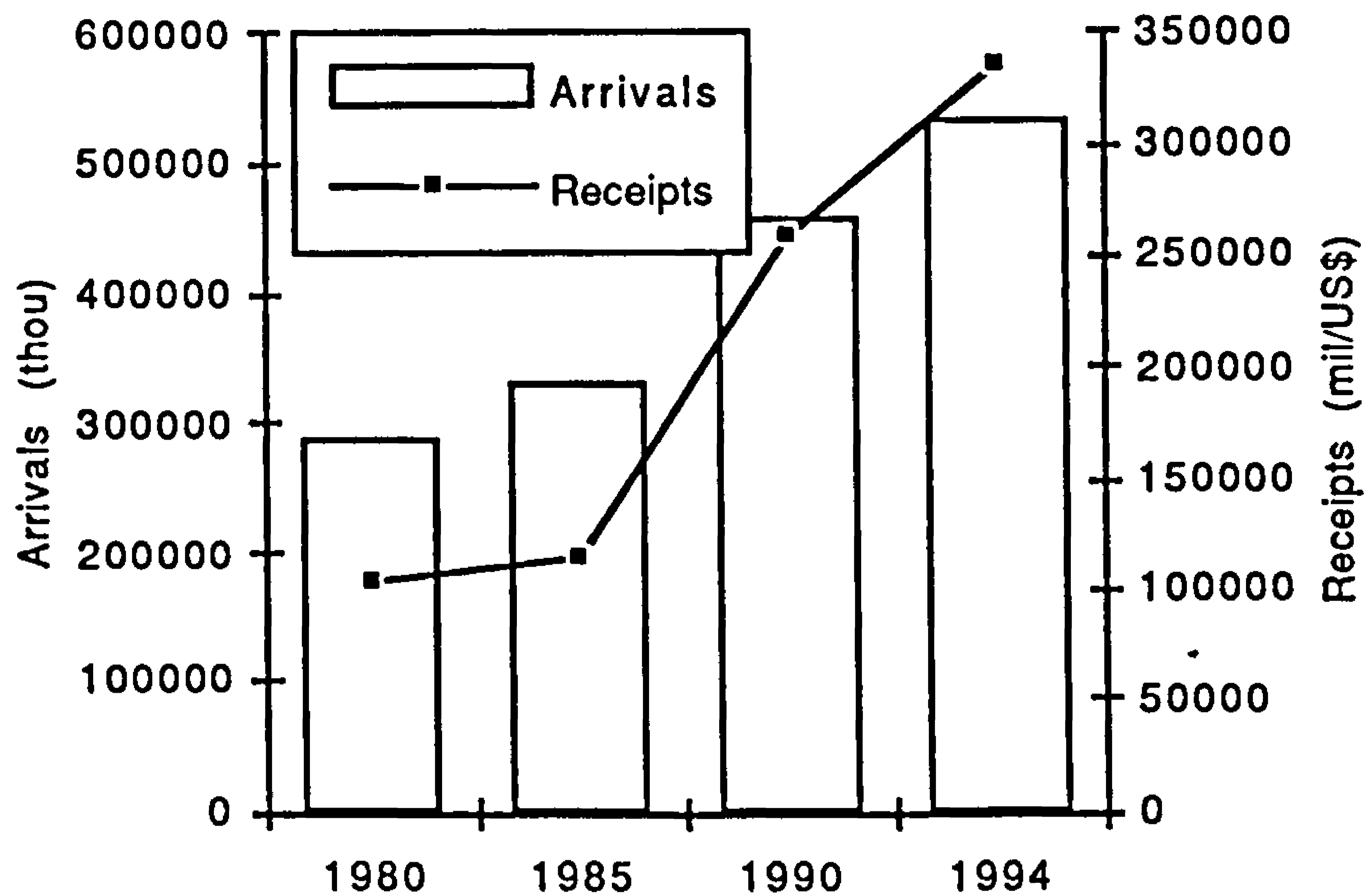
It was seen in section 2.3.2 that the tourism industry expanded very rapidly during the 1960 and 1970s. As will be seen below, although not growing so rapidly, the tourism industry has continued to expand steadily up to the mid-1990s.

Table 2.2 - Arrivals of tourists from abroad and receipts from international tourism (1980-94)

Year	Arrivals (thousands)	% increase	Total (million US\$)	% increase
1980	284,282	-	103,062	-
1985	327,570	15%	116,147	12%
1990	455,812	39%	261,014	124%
1994	531,388	17%	335,780	17%

Source: WTO (1995)

Figure 2.8 - World tourist arrivals and receipts (1980-94)



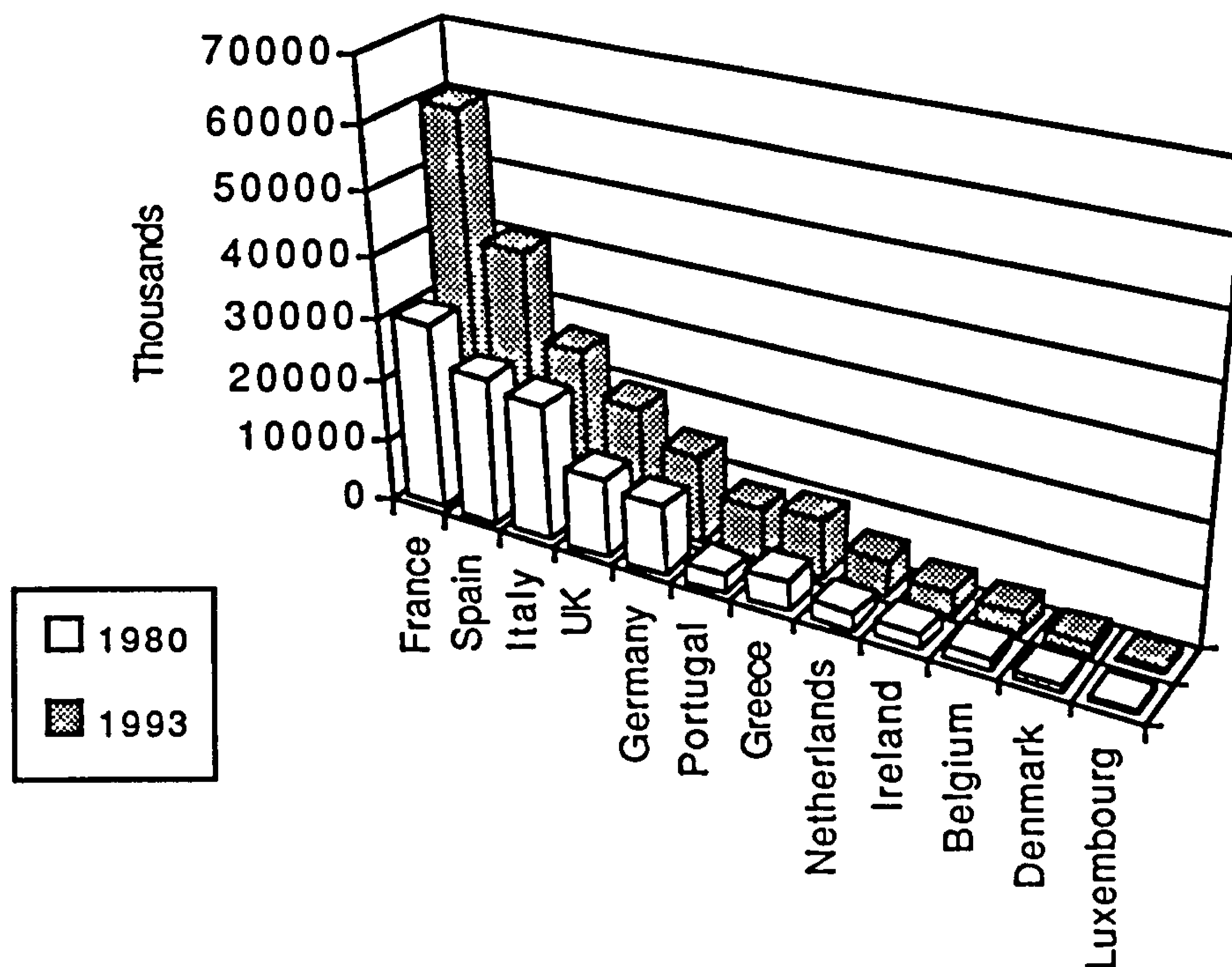
Source: WTO (1995)

Table 2.2 and figure 2.8 show that the world tourism arrivals expanded by 87% between 1980 and 1994, while the world tourism receipts increased sharply by 226% during the same period.

As far as Europe is concerned it is seen that European countries have been world leaders in tourist destinations, accounting for about 60% of the world's tourism (figure 2.14). Indeed, owing to its diversity of climates and cultures, rich and ancient history, and high level of socioeconomic development, Europe attracts the largest share of the world's travel and tourism market.

For instance, figure 2.9 shows how growing numbers of tourists choose Europe as their favourite destination. Between 1980 and 1993 arrivals in the EU rose by 68%. Hence, some of the EU members states have become the most popular tourist destination areas (see WTO, 1995). France, Spain and Italy were ranked as the first, third and fourth world most popular destinations in 1993, whereas the UK and Germany climbed to the sixth and twelfth places respectively. Despite their smaller size and lower level of socioeconomic development, Greece and Portugal were ranked fifteenth and seventieth.

Figure 2.9 - Tourist arrivals in the 12 EU countries (1980-1993)



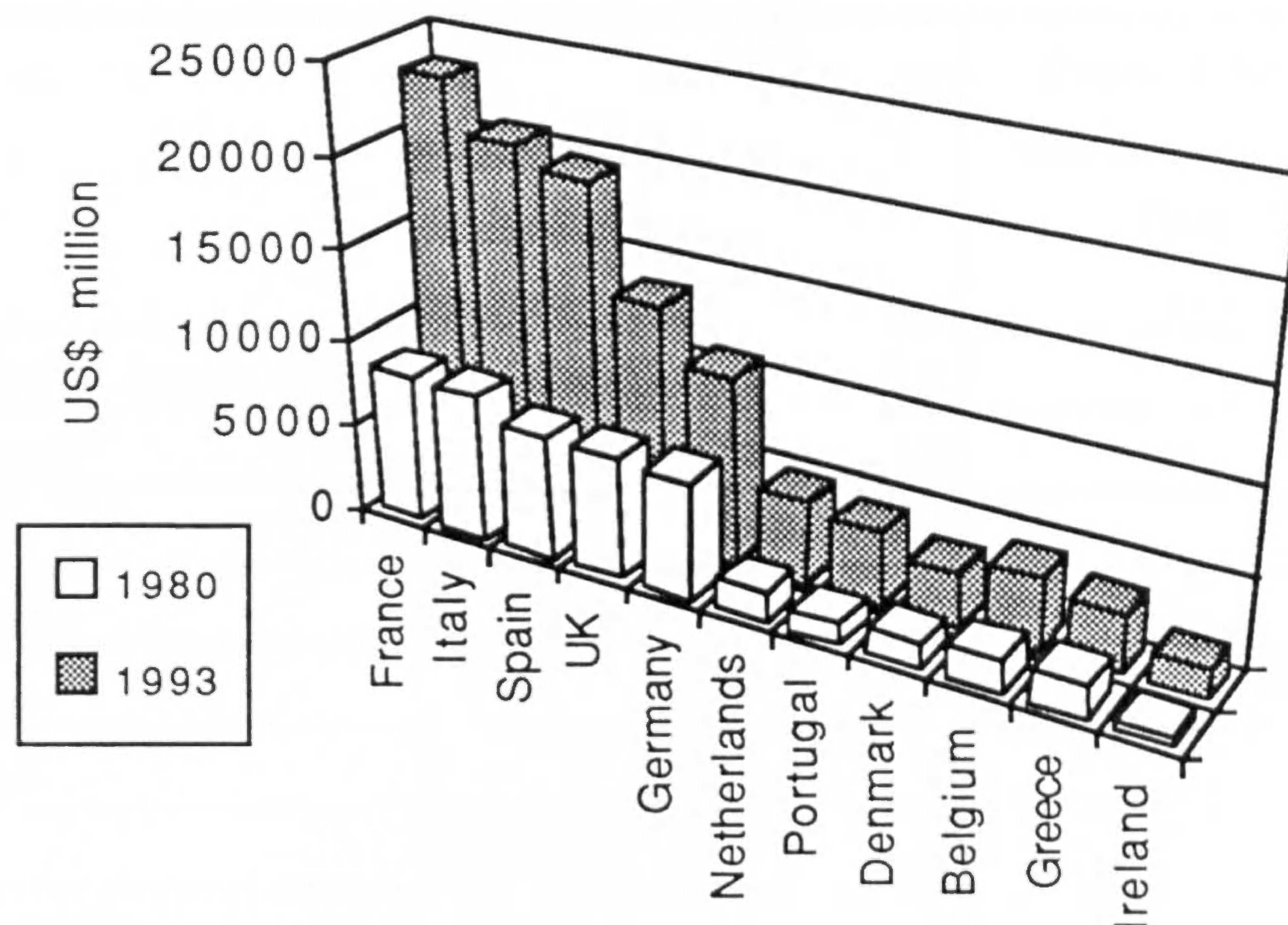
Source: WTO, 1995

As a result of the widespread movement of tourists within the EU borders, tourism has become one of the most important economic sectors for several EU nations. Between 1980 and 1993 the receipts created by tourism within the 12 EU states went up by 1.41 (WTO, 1995). With receipts amounting to US\$ 23,410 million France was ranked in 1993 as the world's second largest tourism destination, just behind the USA with US\$ 57,621. Also, Italy, Spain, the UK and Germany reached, respectively, the third, fourth, sixth and seventh places, while the Netherlands and Portugal, the last one with US\$ 4,176, were classified as the fourteenth and eighteen largest tourist areas (see figure 2.10).

The impact of tourism on a number of EU countries is so significant that nowadays many of them could hardly afford to survive without it. Table 2.3 shows that in Spain, Greece and Portugal the 'travel' receipts accounted in 1993 for 19.9%, 23.4% and 15.5% respectively, of the countries' receipts in exports of goods and services.

Among the twelve EU countries it is, nevertheless, in Portugal that tourism has the largest impact on the GDP (see table 2.3). In 1993 it accounted for 4.8% of the GDP, and it is believed that it will rise to about 8% by the end of 1996 (an expanded analysis of the Portuguese tourism

Figure 2.10 - Tourist receipts in the 12 EU countries (1980-1993)



Source: WTO, 1995

sector and organisation is introduced in chapter 5). Yet, in Greece, Spain and Ireland the tourism sector accounted, in the same period, for 4.6%, 4.1% and 3.3% respectively of the GDP. Its growing importance is even noticeable in nations with economic structures dominated by manufacturing and 'classical' services. For instance, the share of tourism exports in the whole exports of goods and services in Italy, France and the UK reached 8.6%, 6.1%, and 3.9% respectively in 1993.

It will be seen later that despite its rapid growth the European world share is sliding down (figure 2.14). Indeed, between 1980 and 1993 Europe lost a slice of 5.43% of the world's tourism, to regions such as East Asia/the Pacific (+6.21%) and Africa (+1.01%). Such a situation demands, among other things, a profound rethinking of the way in which tourism is viewed in Europe. The alternative organisational framework proposed in chapter 4 (tourism networks) aims at, among other things, to provide alternatives able to help reverse this situation.

Table 2.3 - Impact of tourism on the 12 EU countries' economies (1993)

	Share of 'travel' account receipts in exports of goods and services (1993)	Ratio of the 'travel' account receipts to the GDP (%) (1993)
Belgium-Luxembourg	1.8	1.9
Denmark	4.2	2.3
France	6.1	1.9
Germany	2.0	0.5
Greece	23.4	4.6
Ireland	4.7	3.3
Italy	8.6	2.2
Netherlands	2.5	1.5
Portugal	15.5	4.8
Spain	19.9	4.1
UK	3.9	1.5

Source: OECD, 1995

The developments introduced in the last two decades in town planning, as well as the socioeconomic changes operated in Europe and worldwide, discussed in the previous section, have also decisively influenced both the way tourism planning evolved in the late 1980s and the way it will proceed in future.

Focussing on how the English and the Portuguese tourism planning systems progressed in the last decades, Costa (1991a) argues that particularly in England the socioeconomic changes brought about by neo-liberalism have strongly affected the English tourism planning system. Basing his viewpoints on the research conducted, among others, by Cooper (1987b), Medlik (1986; 1989), Heeley (1977; 1981), as well as based on the reports and statements published by the Tourism in Cornwall Project (1987), the Development of Tourism Act (1969) and the British Parliament (1989a; 1989b), he analyses how the issues previously discussed (e.g., neo-liberalism, the shrinking of the state's role, globalization, the decline of the welfare state, the emergence of localism, and the new role established between the public and private sector organisations), have influenced the British tourism planning system.

In particular, Costa argues that the English tourism system has experienced a set of changes from the welfare state philosophy underpinning the legislation published under the 1969 Tourism Development Act, towards a more market oriented approach which emerged in the late 1980s. He mentions that, the 1969 Tourism Development conferred for the first time on tourism an administrative structure designed to coordinate and plan the development of the tourist industry in England. *The Act was primarily introduced to improve earnings from overseas for balance-of-payment reasons, and to encourage tourism and tourist development in the English, Scottish and Wales Regions ... (also recognizing) the role of tourism in developing local economies, namely by providing better loan assistance to projects within those areas under the 'Hotel and Development Incentives Scheme'* (Trade and Industry Committee, 1986 in Cooper, 1987b). The English Tourist Board (ETB) was then established as a powerful body (as the British National Tourist Organisation - NTO) responsible for defining tourism policy and coordinating the participants in the development process. In other words, the 1969 Tourism Development Act conferred on the ETB important responsibilities, such as planning, development, marketing, research, and data collection.

However, with the arrival of the first Conservative government in 1979 it was then argued that the government should reduce its role, leaving the private sector to lead and design the development process, according to its investment and creativity capacity, which led the efficiency, effectiveness and the costs involved in the ETB operation being questioned. Following the policy outcome from the conservative party, there was a shift in the British tourism organisation in the early 1990s, under the auspices of Norman Fowler, a former Secretary of State for Employment charged with tourism affairs.

Norman Fowler's objectives aimed at simplifying *the (former) system, to improve its cost-effectiveness, and also to involve more directly the private sector into the issues of the tourist industry* (British Parliament, 1989a; 1989b). Consequently, a review of the tourism organisation was undertaken. In contrast to the 1969 Tourism Development Act, emphasis was placed on regions (Regional Tourist Boards - RTBs) in detriment to the ETB, because it was considered that regions could better stimulate and coordinate the private sector, as a result of their closer proximity to the tourist entrepreneurs and market (see also section 2.4.1). As will be seen later the trend towards the growing importance of regional level organisations is felt worldwide and in many other areas, as is shown in section 3.3.5.

By devolving several responsibilities to the RTBs, such as the tourism industry's financial support, several responsibilities were removed from the ETB in order to reduce the scale of its activity at the centre. To put it in a different way, the main objective was to move downwards the planning and development functions from the ETB to the private sector and RTBs hands,

and reorient the ETB operations towards marketing and promotion. According to Cooper (1987b) *this represents the early stages of a reworking of the spatial organisation of tourism responsibilities in Britain, by strengthening the regional (tourist) boards, and the merging of the BTA and the ETB to pave the way for a single replacement board.*

This policy represents a practical response to the socioeconomic changes introduced in the 1980s (e.g., less central state intervention, and enlarged importance given to citizens and regional and local organisations - see section 2.4.1). Accordingly, the RTBs have strengthened their role in coordinating and planning the tourist development process. More financial support has been channelled from the ETB to the RTBs. In addition, the RTBs have strengthened their sources of financing with funding from both local authorities and trade. Nowadays, the RTBs develop an important role in the British tourism organisation, by coordinating and setting up policies in close partnership with local authorities and private sector operators. As will be discussed in the next chapter, such a situation reflects the growing importance of organisations at regional level in the modern world (section 3.3.5), the erosion of the dominating top-down approaches typical of the bureaucratic philosophies set up in the 1950s and 1960s (sections 3.2.4 and 3.3.6), as well as the search for more flexible forms of planning (see also section 1.5).

In a similar way to town planning, literature in tourism has also started following the neo-liberal trend which emerged in the 1980s, and discussing the way planning should proceed in future. In this regard Hawkins claims that with *shrinking government budgets ... the political shift to market-driven economies is bringing about a global restructuring in which market forces rather than ideology are used to guide decisions and develop policy* and also that *the present tendency is towards privatization and deregulation of tourism facilities and services* (Hawkins, 1993; pp.189 and 194).

Also, Gunn (1988; p.16) agrees that *planning is political*, supporting those who argue that it is erroneous to address planning matters in a scientific way, as advocated in the 1960s and 1970s (section 2.3), and, thus, denying the capacity of the planners to deal with future on the basis of 'rational approaches'. Discussing some planning experiences in the Pacific Islands (Hawaii, French Polynesia and the Cook Islands) Choy also claims that he could not discover the rationality claimed by some planners, supporting Clare Gunn by stating that *tourism planning assumes a level of knowledge and rationality which in practice may not always be achievable* (Choy, 1991; p.327). Yet, questioning the quantitative models defended by some academics he suggests that it is very difficult to develop accurate projections in tourism planning, even with the help of sophisticated statistical techniques and models, since his research shows that many of them fail in practice (Choy, 1991; p.327).

The questioning of the approaches followed by tourism planners up to the 1980s has been supported by growing literature published in the field. Among the issues which have most been targeted in literature one may cite the following: destination carrying capacity (e.g., Stankey et al, 1985; Butler, 1991; Getz, 1983; Edington and Edington, Graefe et al, 1987; Griest, 1976; Costa, 1991b; Canestrelli and Costa, 1991; Lime and Stankey, 1979); life-cycle concept (e.g., Plog, 1974; Butler, 1980; Haywood, 1986; Cooper and Jackson, 1989; France, 1991; Strapp, 1988; Weaver, 1990; Debbage, 1990); market failure (e.g., Choy, 1991; WTO, 1980); sustainable tourism (e.g., Inskip, 1991; Gunn, 1988, 1994; Murphy, 1985; Butler, 1991; Klemm, 1992; Witt and Gammon, 1991; Pigram, 1990); tourism systems (e.g., Mill and Morrison, 1985; Murphy, 1985); tourism organisations (e.g., Pearce, 1992; Wahab, 1988; Burkart and Medlik, 1982; for further references see Pearce, 1992, p. 2); planning techniques and methods (e.g., Ritchie and Goeldner, 1987; Smith, 1989, 1995; Baker, 1990; Bergstrom et al, 1990; Butler and Worldbrook, 1991; Fletcher et al, 1990; Gradus and Stern, 1980); management of tourist destinations (e.g., Chi, 1989; Pearce, 1991; Cooper, 1991; Pompl, 1991); and strengths and weaknesses of former experiences based on economic approaches (e.g., WTO, 1980, Krippendorf, 1982; Baud-Bovy, 1982; Spanoudis, 1982; Choy, 1991).

The growing number of specialized courses in tourism and of academics attracted by these matters, a richer literature and the influence of the neo-liberal movements on planning theory, have prompted academics to question how tourism planning should proceed in future.

In the same way as with town planning, some academics have suggested that planning should move from a physical to a more comprehensive and integrated approach. That is, it is claimed in literature that planning should become more strategic, and also that the issues which emerged in the 1980s, such as public participation, public-private partnership, environmental matters, the effects of globalization and the reworking of the planning organisations, etc, must be brought into the core of the decision-making and taking process.

Bearing that in mind, several academics and practitioners have recommended the introduction of a new paradigm in tourism, in substitution of the traditional economic approach. Chiefly, from the George Washington University Tourism Policy Forum at its International Assembly held October 30 - November 2, 1990 in Washington DC, attended by participants from 21 countries, an emerging policy outcome was that the *growing dissatisfaction with current governing systems and process may lead to a new framework (paradigm) for tourism* (the conference conclusions are available, for instance, in Hawkins, 1993; pp.184-198; and Inskip, 1991; pp.xi-xii).

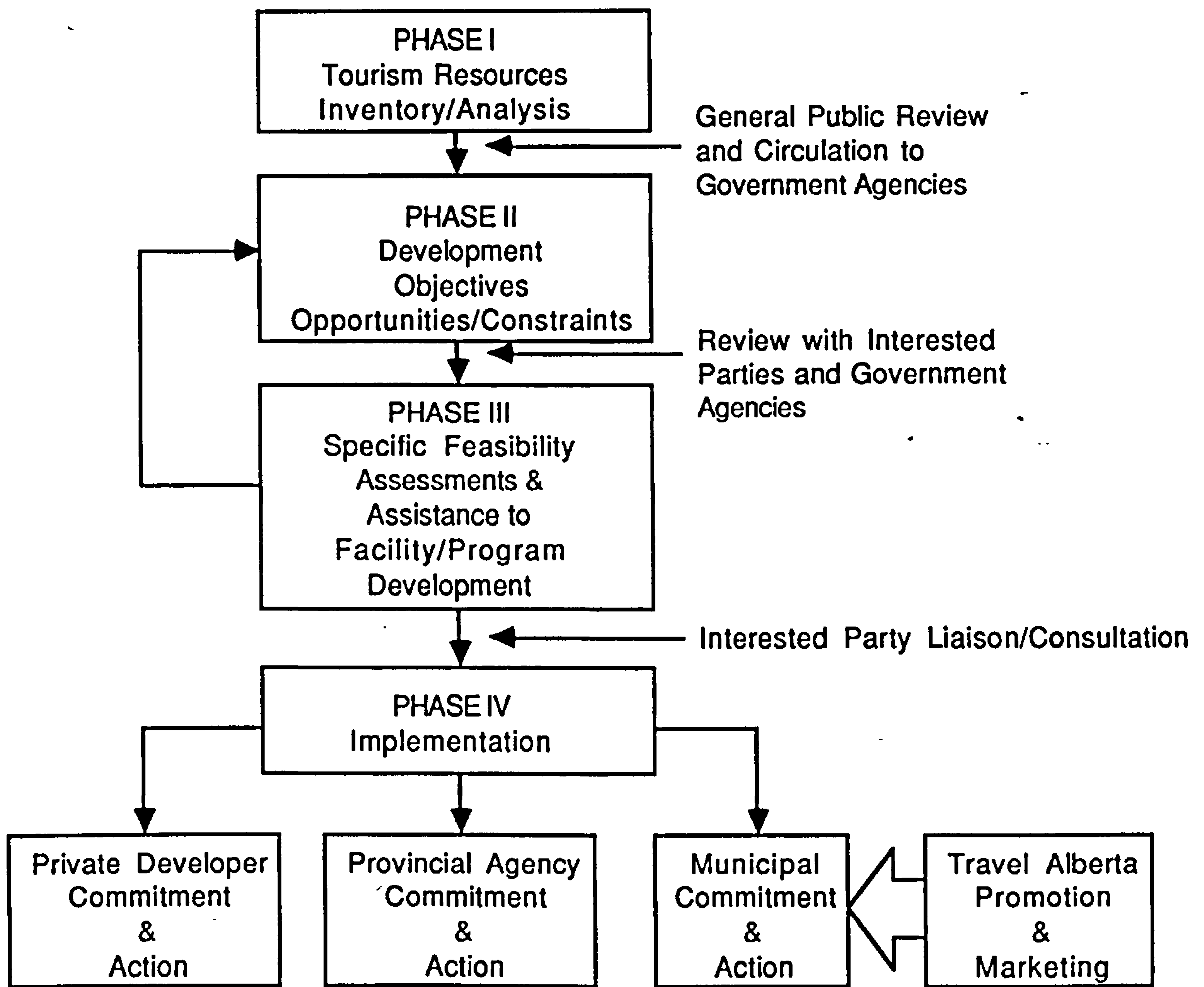
The models formerly created by Baud-Bovy (figure 2.5) and Getz (figure 2.6) constituted an important step in the abandonment of the economic approach which had been followed by planners up to the 1980s. Since then, tourism planning has moved from a narrow economic perspective towards a more integrated one. In addition, the socioeconomic context brought about by neo-liberalism pushed the planning systems beyond the philosophy which had flourished under the umbrella of the Chicago School (see section 2.3.1). In the early 1990s, the question is no longer about economic vs. integrated approaches, since such a discussion is already outmoded. Instead, nowadays the question is how the integrated and rational approaches can be seen in a market context. That is, how decisions based on technical expertise could be brought together with increased levels of public participation, private sector involvement, horizontal integration, and so forth.

The model developed in Alberta (Canada) is amongst the approaches that best illustrates the abandonment of the former planning styles (figure 2.11). In opposition to the market approaches of previous years, it is suggested in the model that promotion should only take place after a tourism development plan (TDP). That is, tourism development should start on the basis of a careful analysis of the area in terms of its potential. After establishing the TDP, implementation takes then place. It should still be pointed out that private sector developments, promotion and marketing are recommended to be executed in accordance with the guidelines proposed in the TDP. In other words, great emphasis is placed on the early planning stages, namely in terms of resources inventory, analysis and definition of development objectives.

The Alberta Destination Zone Process is a good example of one of the most important shifts that have been operated in tourism planning. In fact, the evidence gained from the tourism projects implemented in the 1960s and 1970s shows that when tourism is exclusively based on economic objectives it is likely that there will be an impact on the environment and society. Besides, plans geared to short-term profit are not able to take full advantage of the tourism industry, namely in terms of medium and long-term profits, multiplier effect created by indirect and induced effects, and investment and development stimulated in other sectors.

Based on these assumptions tourism literature has moved forward by defending policies based on planned strategies. However, it should be underlined again that such a tendency does not represent a step backwards towards the rigid and inflexible approaches that inspired town planners in the 1950s and 1960s, but, instead, must be viewed a 'back to the future', where tourism planning is undertaken according to the new liberal approach, and thus with, deference, to markets (see also section 2.3.1).

Figure 2.11 - Alberta destination zone process



Source: Gunn (1988; p.196)

Although containing some important innovative characteristics, it might be considered that the Alberta model is between Baud-Bovy's and Getz's systematic approach and the type of planning that is likely to be undertaken in forthcoming years, since the model follows the traditional (rigid) planning steps advocated by many planners. It is suggested by the model that plan preparation and implementation should be carried out separately by, respectively, the public and private sectors, and, therefore, implicitly defends the premise that they are different sorts of enterprise. Despite the emphasis placed on the need for developing tourism according to the uniqueness of each region, matching marketing and promotion according to the local assets, such a proposal does not completely follow the dynamics created by neoliberalism. It lacks flexibility, strategic planning, and closer involvement between public and private sector organisations.

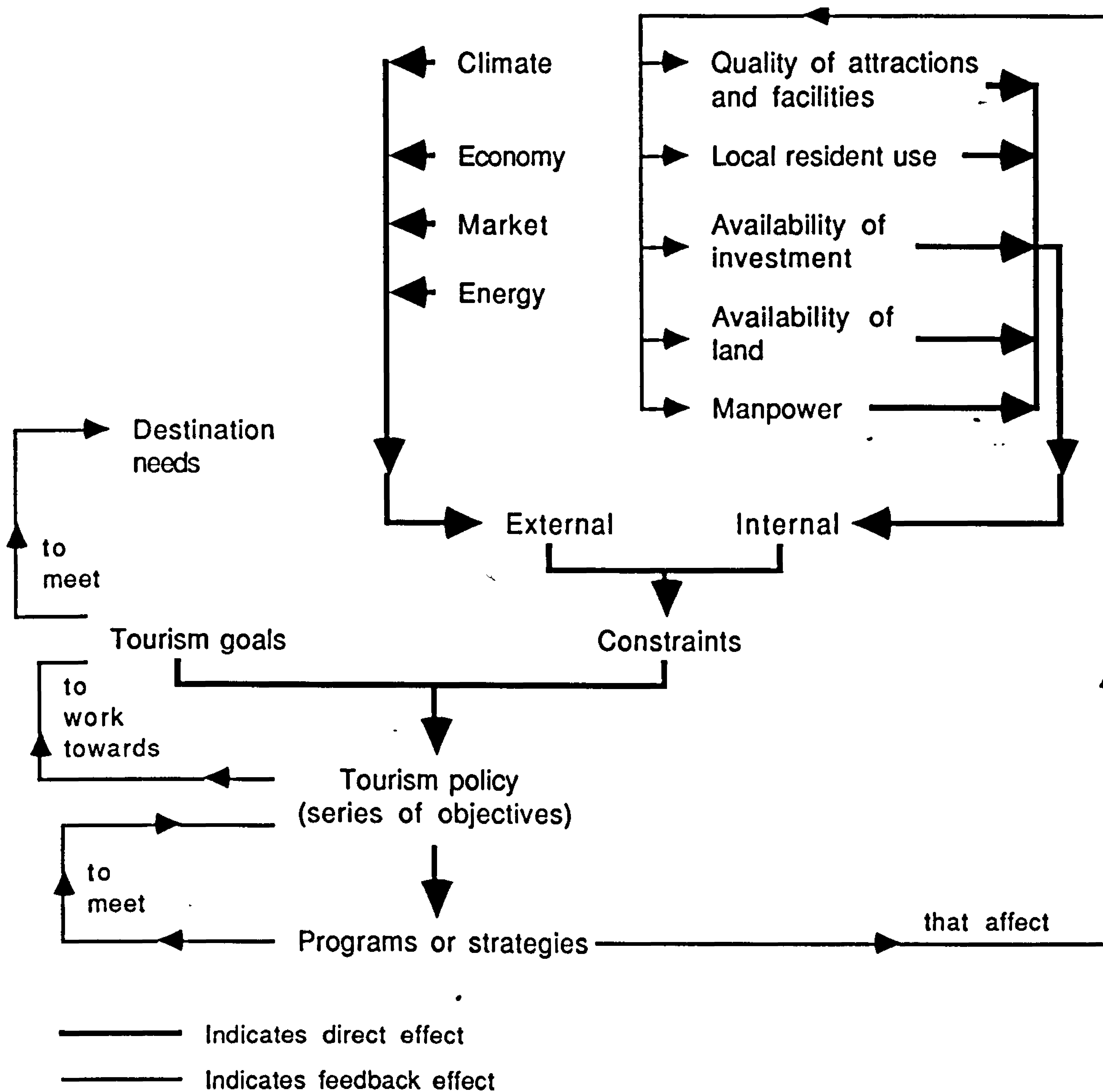
Among the models that best represent the approach containing the philosophy that it seems will dominate the planning systems in future, emphasis may be given to the one proposed by Mill and Morrison (1985). Their proposal, represented in figure 2.12, is based on two key issues. Firstly, it emphasizes tourism policy rather than plan preparation. In other words, it is argued that tourism planning in future should be more oriented towards strategic rather than normative approaches, and built upon the creativity and availability of resources of both public and private sector organisations. Secondly, it is claimed that market considerations have to be carefully matched according to external factors, such as climate, economy, and energy. In parallel, it is considered that these external elements have to be matched against the internal characteristics of each area, such as the quality of attractions and facilities, local resident use, availability of investment, and manpower. Implicitly it is denied the use of models able to be transposed to different areas, by defending instead the need for specific planning for each tourist destination (idea of 'uniqueness').

A similar perspective may also be found in Edgell's (1990; p.105) proposal (see figure 2.13). Again, it is claimed that tourism policy should be tailored based on a realistic economic perspective, taking into account not only short but also medium and long term economic impacts. Yet, it is suggested that tourism policy should be viewed in a systems approach, encompassing the socioeconomic and environmental characteristics of the destination area, the objectives pursued by local authorities, and the availability of resources. In accordance with this principles, Edgell suggests the following 'formula' to be applied in the tourism planning and policy process:

The new emerging perspective represented here by Mill and Morrison's and Edgell's models, has undoubtedly started influencing the way in which both public and private sectors have started to address the tourism development process. In addition to the economic benefits created by tourism, the new planning concept also takes into account issues linked to sustainability and medium and long-term economic benefits.

In some features the British tourism administration illustrates how these new concepts have been assimilated by governments into their policies, as well as by professional organisations with strong influence on decisions which are taken by governments. For instance, the Royal Town Planning Institute (RTPI) has recently started demanding an increased prominence of the regional organisations in the planning process. Such a positioning confirms how the tendency introduced by neo-liberalism, by giving importance to planning at the regional and local levels in detriment to the national levels, has already started producing practical effects. The RTPI claims that *the present machinery for the development of national and regional planning policies*

Figure 2.12 - Tourism policy model



Source: Mill and Morrison (1985; p.245)

Figure 2.13 - The model of Edgell

$$P = f(G) + f(R) + f(E)$$

where:

P = the tourism policy developed

G = the goals and objectives

R = the resources available

E = the given conditions

f = function of

is inadequate and strongly advocates the preparation of regional plans ... to secure effective strategic planning at the regional level (RTPI, 1992, pp.7-9). Such a claim underlines the comments introduced by Thomas and Kimberley (1995) about the revival of regional planning activity that nowadays may be noticed in Britain (see section 2.4.1).

Despite it being considered by the RTPI (1992; p.8) that, although not enough, *the regional planning advice and guidance are steps in the right direction*, it also seems undeniable that the report on the 'Planning Policy Guidance for Tourism - PPG 21' (DoE, 1992), embraces the new tourism planning concept which emerged in the 1980s. In other words, the PPG 21 assumes a clear departure from the former inflexible planning approaches towards forms of more strategic planning.

For instance, although mentioning that *the Government's policy is that the tourism industry should flourish in response to the market*, it is also stated in the PPG 21 that *the central objective is to achieve 'sustainable development' that serves the interests of both economic growth and conservation of the environment* (DoE, 1992; sections 1.2 and 2.4). In other words, the Government continues to emphasize the need to look for the economic profits produced by the tourist industry. Nevertheless, it also outlines that this should be sought according to the socioeconomic and environmental uniqueness of each place.

A second aspect documenting the way in which the British government has changed the way in which tourism problems are tackled is linked to the recommendations provided for preparation of tourism policy. It is suggested in the PPG 21 that planners should not look only at the guidelines established by the report, but also at other matters influencing tourism. The report draws attention to areas such as the environment (with guidelines established by the ETB, 1991); general policy and principles (PPG 1); green belts (PPG 2); industrial and commercial developments and small firms (PPG 4); the countryside and the rural economy (PPG 7); development plans and regional planning guidance (PPG 12); highways considerations in development control (PPG 13); sport and recreation (PPG 17); advertisement control (PPG 19); coastal planning (PPG 20); as well as nature conservation, listed buildings and conservation areas (DoE, 1992, sections 1.4 and 1.7). In other words, the new policy outlines the need to see tourism planning in a more horizontal way, i.e. in a corporate approach. Accordingly, instead of looking within each organisation the report points out ways in which planning can be viewed in a horizontal way embracing the organisations that are involved directly or indirectly in the tourism network and, thus, that intervene in the planning process.

Not denying the importance of the PostFordist horizontal planning approach in detriment to the vertical ones (see sections 3.2 and 3.3), Medlik (1989) questions the effectiveness of such a

policy when governments have not yet introduced or designated any body or mechanism of the tourism organisation to coordinate the amalgamation of products and organisations involved in the tourism industry (see section 1.4). Particular support for this comes from Cooper (1987) when he claims that the British tourism system has entered a phase of *reworking of the spatial organisation of tourism responsibilities* for which structures have to be carefully designed if tourism planning is to succeed. This is the reason why one of the central objectives of this thesis is to match the need for improvement in the 'procedural component' of planning with improvement in the 'administrative component' in which it is carried out (see research objectives, section 6.2).

In third place, the PPG 21 does not provide rigid guidelines for the way in which developments are to be implemented, leaving such a task to local strategies and, therefore, to be put forward under structure and local plans (DoE, 1992; sections 1.6, and 4.4 to 4.17). As in town planning, regional tourism planning is here regarded in a more (flexible) strategic way. It is believed that the design and implementation of plans should be looked at within the particularity of each area, and fulfilled bit by bit according to the creativity and resources of the public and private sectors as suggested by Mill and Morrison (see figure 2.12).

Finally, the report stresses that strategies are to be found through the direct involvement of local communities (DoE, 1992; section 2.5). In spite of that, the report is not clear about the way in which that is to be achieved. To put it more simply, by stating that planning should start with 'survey' and 'analysis' (DoE, 1992; section 2.5), it might be understood that the initial planning stages are exclusively left in the planners' hands. Assuming that as true, there are two main considerations which should be made. In first place, the government assumes that planners are the stimulators and coordinators of the planning process. In second place, the emphasis is on substantive rather than procedural planning forms (see figure 2.7). In other words, a clear contradiction may be noticed between the Conservative government's speech and their practice. While claiming a dilution of the planning importance and quicker and more pragmatic approaches, the policy endorsed by the government points to different direction, which may be understood within the context of the revival of the planning activity, as suggested by Thomas and Kimberley (1995) and Brindley et al (1989) in section 2.4.1.

Comparing tourism and town planning evolution some similarity can be noticed. Whereas town planning in the 1960s and 1970s was viewed as a public sector activity, responsible for regulating the development process in a normative way, tourism was left in the private sector's hands. Planning was then viewed as an activity supporting private investment. In the 1980s both fields changed substantially in their approaches, and a certain approximation between them might be observed. That is, town planning has evolved from a regulative approach towards a

more strategic one, where the component 'market' has assumed greater importance. It is believed at present that town planning cannot be exclusively undertaken within planning departments. Instead, it has to take into account the involvement of both private sector and citizens. In opposition to that, tourism approaches have evolved from an economic to an integrated perspective. In other words, it is nowadays believed that economic objectives have to be dealt with according to the socioeconomic and environmental characteristics of each region, and also that they must be looked at within a comprehensive strategic plan. The importance of closer cooperation between town and tourism planning is particularly well documented in a article published by Dredge and Moore (1992). Based on the case of Australia they discuss the advantages of bringing both fields closer, the reason why they propose 'A methodology for the integration of tourism in town planning'.

It should nevertheless be pointed out that it is not the objective of this thesis to argue that there should be a merger in future between town and tourism planning, when evidence has precisely suggested the opposite. It is valid to state that the objective and tools used by both are to a large extent similar. Also, their individual success largely depends on the achievements of the other. Furthermore, because tourism planning has emerged as a specialization of town planning, tourism and town planners' background as well as the methods and techniques used are similar. However, it is also undeniable that there is a much more intense involvement of the private sector in the tourism industry when compared to town planning, and also that the tourism sector and products are involved in a particularity of problems that demand to be addressed in very specific ways (see section 1.4). The exchange of information, methods and techniques between town and tourism planning is nevertheless, and for obvious reasons, important.

The discussion about the way in which the socioeconomic changes and the evolution of tourism have influenced practice and theory, does not attempt to exhaust this theme. Instead, it raises a set of issues which will probably in future dominate the tourism planners' agenda.

In a similar way to that followed in the previous section 2.4.1, one may then conclude by introducing some of the main issues that will influence tourism planning in forthcoming years. Similar to town planning, the first area that will dominate the planners agenda will be the need to bring informed solutions to the decision making process. In other words, in opposition to the short-term economic approach of former decades, it is likely that planning in future will be founded on a wider range of issues, encompassing not only economic but also social and environmental matters ('comprehensive planning').

The model created by Miossec (1977) is particularly critical of the short-term economic approaches followed in former decades. Miossec points out that when tourism is left on its own

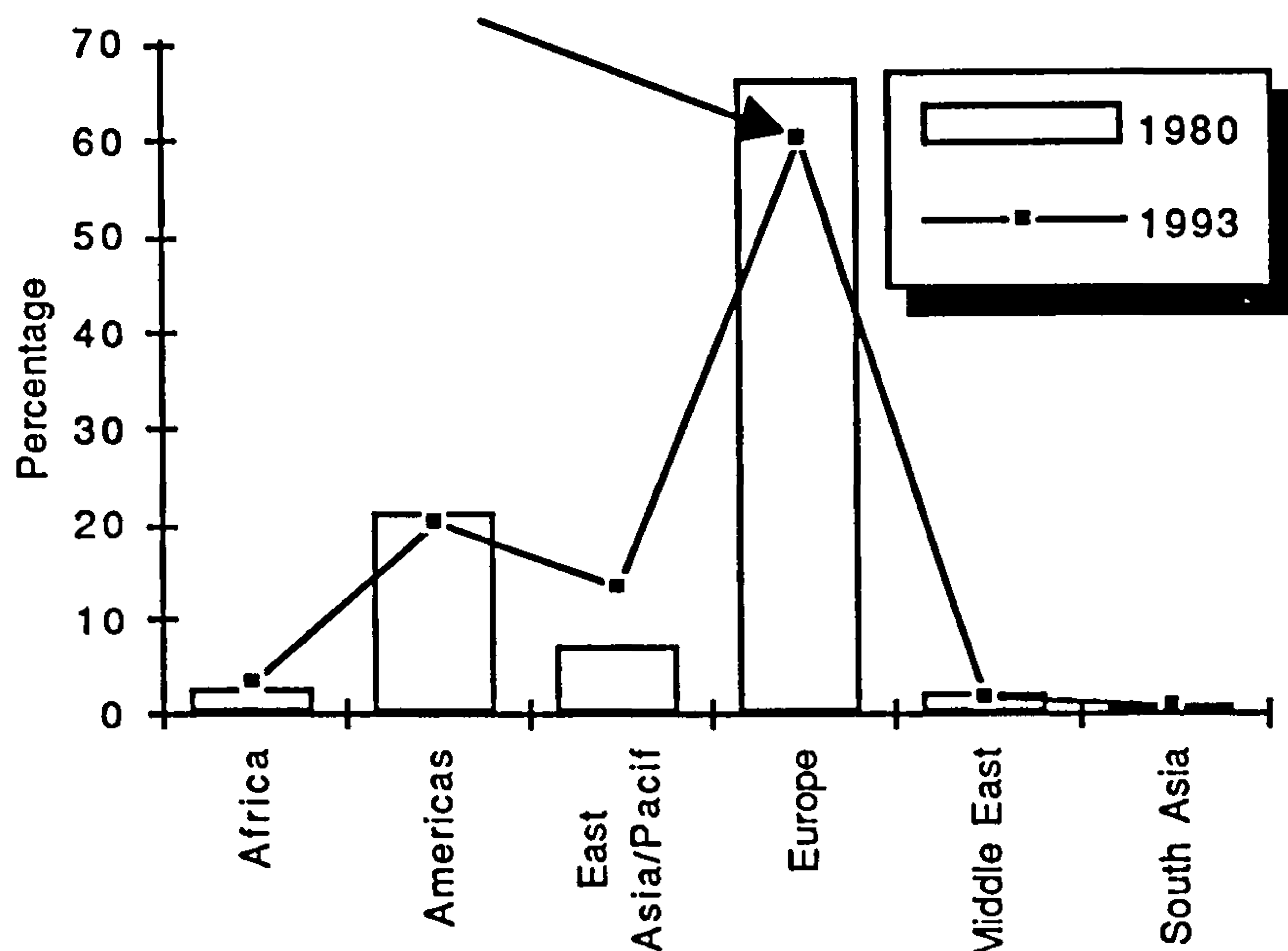
it is likely to produce a negative impact on the environment (e.g., on fauna, flora and water), society (e.g., segregation, dualism, demonstration effects), and urban systems (e.g., spatial competition, disintegration of perceived space, saturation). In other words, only in later phases development plans and ecological safeguards assume centre stage. However, what may then happen is the departure of some tourist segments initially attracted to the region by its initial appeal (see also Butler's model for a complementary analysis (Butler, 1980)). Once such potentialities have been spoilt the resort may enter a phase of stabilization or decline. Thereafter, only massive and expensive interventions may eventually allow a certain revival of the tourism activity (regeneration process).

In addition to this, it must be thought that with the growth of tourism in long-haul destinations such as Thailand, Malaysia, Australia, etc, as well as with the improvement in tourists' education, it is likely that increased pressures will be brought to bear in a number of European resorts, namely to those flourishing under the umbrella of the 'sun, sea and sand' market. In this respect, figure 2.14 illustrates that, based on these and on other problems, the Europe's world share went down by 5.43% between 1980 and 1993. Conversely, the number of international tourist arrivals rose, in the same period, by 6.21% in the East Asia/Pacific region, and by 1.01% in Africa.

It is based on this and other facts that one of the most important conclusions to come out of the George Washington Tourism Policy Forum, was that competition and quality are taking centre-stage in tourism, and, therefore, governments *must move proactively rather than in response to various pressures as they arise* (Inskip, 1991; p. xii). The development of comprehensive planning policies capable of bringing informed solutions to the planning of the tourism sector will undoubtedly be viewed as the cornerstone dominating tomorrow's approaches. As pointed out by Doorn (1991) because *the future can be partially known by way of scientific methods and techniques*, the potential informed solutions brought about by planning may play a crucial role in future planning. With regard to this, and as will be discussed in chapter 4, networks of organisations offer an alternative way of tackling these type of problems, due to their capacity for bringing together a wider number of organisations and making whole regions more competitive in the travel and tourism market.

A second main issue that will dominate tourism in forthcoming years is the administrative framework in which planning is to be put forward. The tendency is for national governments to orient their actions towards broad policies and strategies, leaving to regional and local organisations their translation and implementation according to the uniqueness of each region. With this regard, it was also concluded in the George Washington University Tourism Policy Forum that *market forces rather than ideology are (increasingly) used to guide decisions and*

Figure 2.14 - Share of the world's tourism arrivals by WTO regions (1980-1993)



Source: WTO, 1995

develop policy (Inskeep, 1991; p. xii). The closer proximity to markets of lower level organisations bring them greater advantages in this matter, when compared to upper level agencies.

The importance of moving decisions downwards in the administration is also advocated by the RTPI (1992; section 2.5/6). The RTPI claims that regional planning may be implemented even in the absence of institutionalized (formal) regional authorities. Indeed, there is a growing number of situations in which strategic regional arrangements are set up on the basis of loose commitments (for an expanded analysis see sections 4.3 and 4.4). In such situations planning does not necessarily involve formal planning. Nevertheless, evidence has also suggested that such commitments are most likely to be created among private sector organisations. The publication of 'Reinventing government - how the entrepreneurial spirit is transforming public sector organisations' (Osborne and Gaebler, 1992) aims, among other things, to bring some of these ideas into the public sector field.

Within this context, it is likely that the RTBs will start assuming an increased role in the tourism planning process. However, that does not mean that 'super' regional organisations should be set up. Instead, lower level tourism planning should be carried out in a horizontal, flexible and corporate way. Based on the Portuguese situation what will, however, be seen later (see, for

instance, sections 5.3.2.5 and 7.3.7) is that there is a rift between theory and practice. Indeed, what will be shown later is the fact that central governments continue to spread their influence over a number of matters, following the extensive planning forms discussed in the previous chapter (see section 1.5), and also that they put forward policies on the basis of out-of-date centralized and bureaucratic organisational structures (see section 3.2). Besides, it is also observed that most regional organisations (RTBs) tend to set up policies without the effective involvement of other organisations linked to the sector. As will be seen later, such a situation is responsible for weakening policies, such as in terms of accountability, representativeness, legitimacy, efficiency and effectiveness (see sections 7.2.1, 7.2.2 and 7.3.7).

A third main issue which will assume an increased importance in the planners' agenda in future is related to public participation. Indeed, the 1980s have produced higher demanding individuals. By putting individuals in the market centre, neo-liberalism created a 'watching out man' who also has increasingly sought to be accountable to the decision-making and taking process (section 2.4.1).

In addition to this, literature has drawn attention to the fact that some organisational structures set up over the recent past (e.g., Urban Development Corporations, Quangos, networks, partnerships, etc) lack legitimacy and accountability, since, in a number of situations, use public money through non-elected agencies (for an expanded analysis see Hutchinson, 1994). Evidence brought from Portugal provides a good example of that, since a good share of the public money which is dealt by RTBs, is managed by members of the tourism organisation who lack accountability and legitimacy (see section 7.2.2).

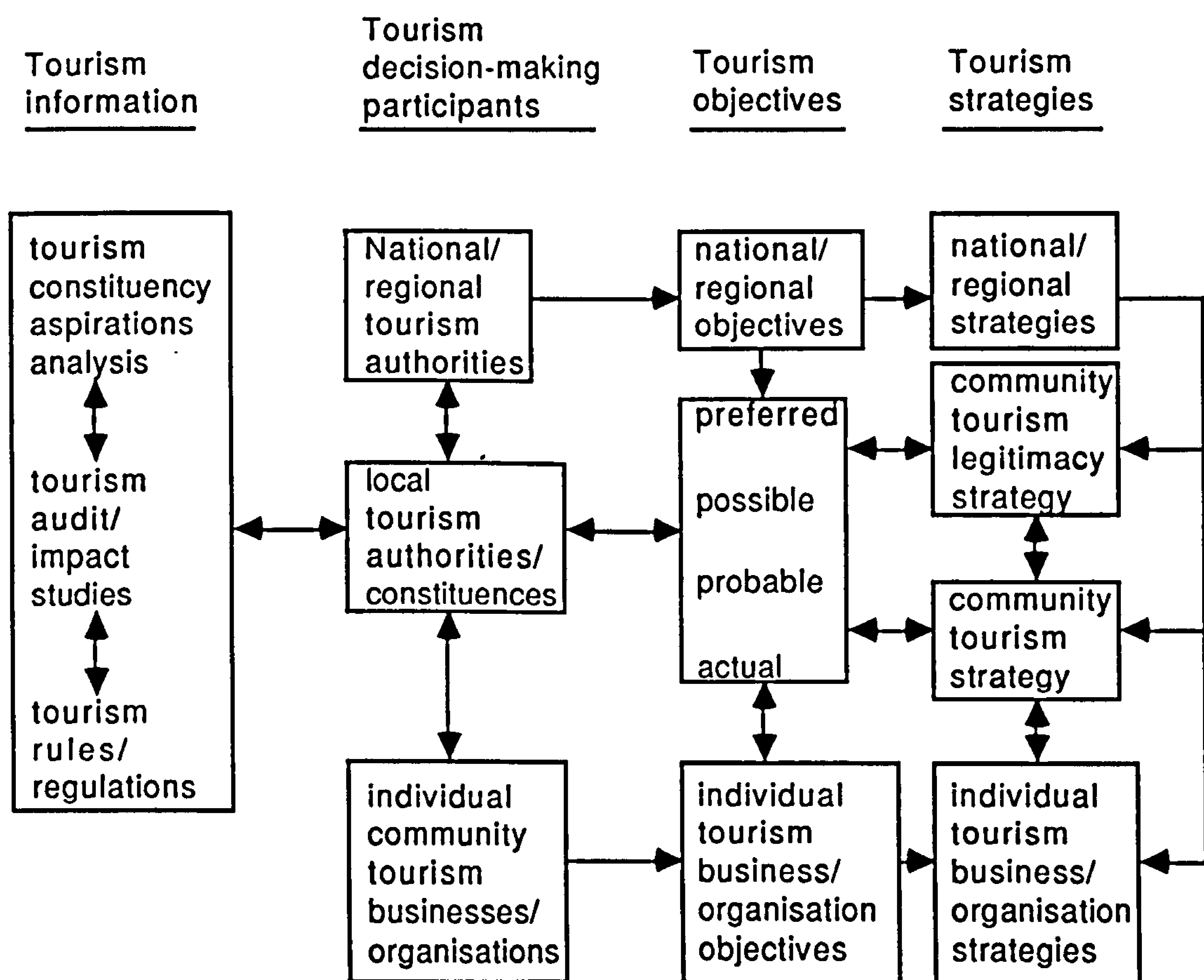
The issue of the public participation assumes particular importance in tourism since it is widely known that the tourism activity is responsible for bringing together stable communities and foreigners, whose life-styles often conflict with each other. Some literature focussing on the social impacts developed by tourism has shown how negative and clashing such relationships may become, as well as how rejection effects may even emerge as a result of that (e.g., Cohen, 1972; Doxey, 1975; de Kadt, 1979; WTO, 1981; Mathieson and Wall, 1982).

Hence, it was concluded at the George Washington University Tourism Policy Forum that *resident responsive tourism is the watchword for tomorrow: community demands for active participation in the setting of the tourism agenda and its priorities for tourism development and management cannot be ignored* (Inskeep, 1991; p. xi). Recognizing the crucial importance of a *greater balance ... to be struck in weighting the desires of visitors against the well-being of their hosts*, Hawkins also states that *there is a genuine concern that if host communities do not*

benefit from tourism they will become alienated and reject tourism in all its forms (Hawkins, 1993; p.190).

The tendency to bring together visitors and local communities may already be noticed in a growing amount of literature. For instance, Murphy (1985), in a book entitled 'Tourism: a community approach', provides a comprehensive way to address this matter. Also, Haywood (1988), in an article entitled 'Responsible and responsive tourism planning in the community', introduces a sensible schematic representation illustrating a symbiotic planning approach to the way in which tourism and local communities may be addressed (figure 2.15) (for an expanded analysis see also Haywood, 1994; Falk and Brodie, 1975; Blank, 1989; Gunn, 1994; Pearce, 1989; Rosa Pires and Costa, 1992).

Figure 2.15 - A sample community planning paradigm



Source: Haywood (1988; p.114)

A fourth main issue that will dominate the planners' agenda in the future is the way in which strategies should be designed. Up to the 1980s planning used to be dominated by forms of substantive knowledge (see section 2.3.1 and in particular the discussion centred on figure 2.7). However, as a result of the shrinking of the state's role and the increased importance of markets, planning has been pushed towards procedural styles.

The evolution towards procedural planning forms seems to bring to tourism the following main advantages. First of all, it would be hard for planners to operate now a U-turn on their styles. In other words, it would be unrealistic to introduce an overnight change from an economic towards a rational planning form. Moreover, private sector organisations assume a more prominent and interactive role in tourism than in town planning. In addition to this, their dynamic and flexibility is incompatible with the 'heavy' characteristics of the substantive approaches.

The importance of privileging approaches founded on procedural knowledge also finds echo in some specialized literature. For instance, Gunn (1988; p.238) argues that *market-product match is fundamental*. In other words, he draws attention to the need to avoid lengthy planning forms. The emphasis is then put on styles able to adjust tourism to destinations areas. Also, Falk and Brodie (1975; p.81) claim that *decision-makers and planners should play a minor role in the establishment of goals to which their plans and decisions relate*. That is, they state the need for increased levels of involvement of both private sector and citizens in the decision-making process in order to avoid the lengthy planning forms of previous decades. Again, the importance of procedural planning is stressed to the detriment of substantive planning.

This tendency has also been supported by the development of techniques that help planners to put these ideas into practice. For instance, 'the objective tree' may be used in the preparation of more realistic strategies. In addition, the use of other processes such as the 'the critical path method', 'the project evaluation technique' or 'Delta charts' may also be used to achieve similar aims (see Baker, 1990).

A fifth main tendency that may be introduced here is about the way in which the relationship between public and private sector organisations is likely to evolve in future. Most of the organisational arrangements set up in the past were strongly influenced by the bureaucratic model developed by Max Weber. However, the socio-economic transformations operated over recent years have pushed a number of organisations towards more flexible structures. The emergence of horizontal and down-top approaches, partnership schemes, networks, and so forth, are examples of this recent trend (for an expanded analysis see chapter 3). It will be seen in chapter 7 that the Portuguese regional tourism administration is a good example of that.

However, it will also be seen that, although included in the same administration, public and private sector organisations are poorly connected and coordinated with each other.

Despite these remarks it is nevertheless observed that the concept of organisation has started moving away from a purist public sector point of view, typical of the Fordist phase, towards more flexible commitments, involving private and public sector organisations. In opposition to what is often thought, Wahab (1988) illustrates that a number of tourism organisations are based on close relationships between public and private sector. He gives the example of Switzerland, Sweden, Ireland, Singapore, Thailand, South Africa where tourism organisations are semi-public, as well as the case of Austria, Germany, Norway and Hong-Kong where some tourist organisations are run by private sector operators (Wahab, 1988; p.175).

A book published by Pearce (1992), focussing on the same subject, also shows that the concept of organisation has become a volatile one, since growing numbers of formal and informal arrangements have been created to cater for particular situations, depending on the partners involved and on the specificity of each situation (see also Sweeting 1995; Perry, 1995; Henriksen, 1995; Berry and McGreal, 1995; Ohmae, 1995; Handy, 1994; Palmer, 1994; Jarillo, 1993; Stoker and Young, 1993; Osborne and Gaebler, 1992; Hollis et al, 1992; Bennett and Krebs, 1991; Wade, 1990; Quince, 1990; BTA, 1990; Bennet et al, 1989; SQW, 1988; DHS, 1984). In short, the rigid division between public and private sector has gradually been abandoned. This issue will be the subject of an expanded analysis in the two following chapters, where it will be discussed how nowadays organisations demand more flexibility as well as how the bureaucratic top-down structures are increasingly becoming inadequate to deal with today's world.

The final issue that one may raise here is about the impact of the world's globalization on tourism (see also section 3.3.3). Another conclusion drawn by the George Washington University Tourism Policy Forum was that *regional political economic integration/cooperation will predominate* in future (Inskeep, 1991; p.xii). With regard to this Hawkins (1993; p.196) also states that because *tourism is generally considered to be a 'free-trade industry', there is a strong realization that emergence of ... new political/economic blocs may lead to increasing tensions as well as pressures to harmonize jurisdictional conditions across countries within each trade area*. In other words, supra-national treaties, such as those created under the umbrella of the EU, NAFTA, MERCOSUL, and GATT, will increasingly influence the way in which countries set up their policies, which means that tourism policies and strategies may no longer be exclusively viewed within the country borders but, instead, in a transnational way.

In particular in Europe a number of nations have been challenged by the EU, since several pieces of legislation have been passed and funds have become available under a set of principles defined by Brussels. Hence, the EU member states have been pushed to adapt their administration and establish policies according to guidelines set up outside their borders.

A good example of the way in which the EU has influenced its members states is provided by the RTPI (1992; p.46). The RTPI illustrates that the influence of the EU in the British planning system may be noticed at all levels, ranging from the national government to the local authorities (figure 2.16). In other words, many planning decisions are nowadays influenced by decisions taken outside Britain.

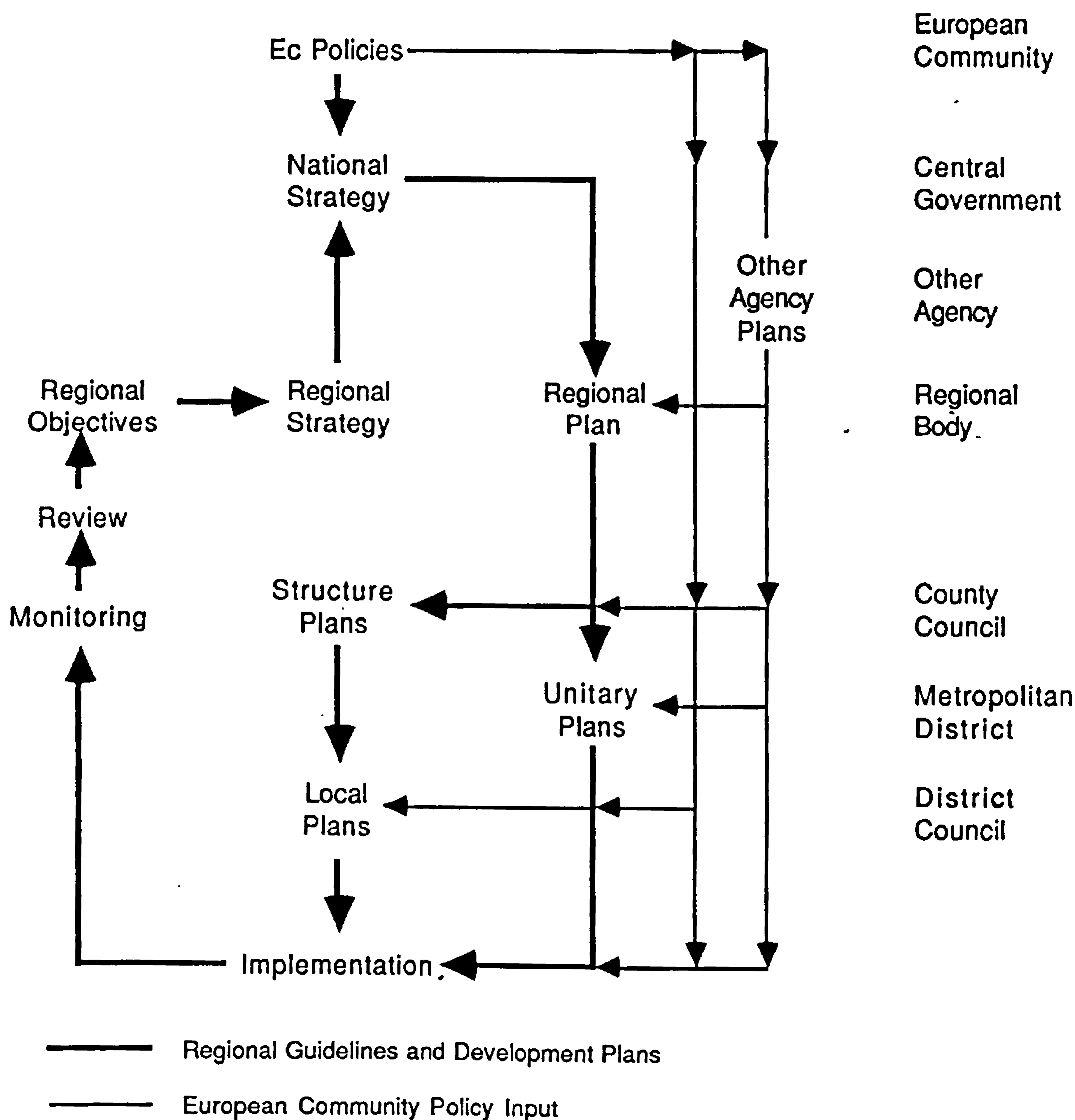
As far as tourism is concerned, a report published by the Technecon (1992) also shows an increasing number of areas targeted by the EU policies. In particular, it is stated in the report that in areas such as transport, competition and consumer protection policy, fiscal policy, employment and social policy, regional development and environment, several pieces of legislation were passed up to the early 1990s, and implicitly suggesting that such a tendency is likely to expand in future to other areas. In other words, it is indirectly argued in the report that national tourism planning policy may no longer be exclusively viewed on a national basis but instead in accordance with EU policy.

2.5. Conclusion

It was seen in this chapter that the concept of planning is very volatile, because planning is an action-oriented discipline which, to achieve its ends, aims at *harnessing whatever knowledge is needed* (Faludi, 1978). It was shown that planning is a discipline which seeks to address problems related to the spatial and social organisation of systems, and, therefore, its evolution takes place alongside changes which are operating in society.

The chapter demonstrated that the origin of modern planning may be traced back to the Industrial Revolution, when an unprecedented movement of people started to take place towards towns. As most towns were unable to cope with additional demand, many problems started to emerge, such as the inadequacy of the water supply, contamination by sewage, housing, transportation, reduction of green areas, promiscuity, prostitution, child labour, etc.

Figure 2.16 - Influence of the EU on the members states' planning systems (the case of Britain)



Source: RTPI (1992; p.46)

Despite the diversity of problems which emerged during this phase it was believed that the origin of all problems was linked to the inadequacy of the equipment and infrastructure in towns to accommodate the arrival of newcomers. Bearing that in mind, planning solutions proposed by classic planners were based on a deterministic rationale; that is, it was believed that by expanding the supply of equipment and infrastructures and by redesigning towns, all problems could be solved. This physical and deterministic approach, which dominated planning approaches in the aftermath of the Industrial Revolution, may also be explained by the fact that planning was a science under the sphere of influence of architects and civil engineers.

However, it was also shown that the rapid economic expansion of the post-war period; the inadequacy of the physical planning solutions brought about by classic planners; and the influence of several new ways of thinking associated with the Chicago School, cybernetics, Positivism, and quantitative analysis, started to push planning away from physical determinism, towards broader ways of thinking which were supported by a wider spectrum of disciplines, such as sociology, anthropology, mathematics, psychology, etc. It was within this scenario that a new planning paradigm emerged in the field in about the 1950s ('rational planning' - see section 2.3).

During the phase in which rational planning reached its climax (1950s-1970s), it was believed among planners that planning solutions could be found through 'scientific' and 'rational' procedures. Bearing that in mind, planners viewed themselves as a kind of wise man capable of curbing the irrationality shown by many politicians, since their solutions were based on scientific method and, therefore, based on high levels of certainty and not on subjective criteria. By this time, planners regarded planning activity as a kind of 'fourth-power' (Tugwell, in Faludi, 1987).

However, the importance and validity of planning started to be strongly questioned during the 1970s and 1980s, as a result of two main points. Firstly, because the practical results of the initiatives put forward in previous times started to become apparent, and it was found that many of the premises on which planning theory and practice were based were wrong. For instance, it was found that planning is not a neutral activity because it favours some groups in detriment to others; also, there is no such thing as scientific planning because solutions are found in accordance with the circumstances of each place, such as availability of resources and manpower, political organisation, social characteristics, etc; besides, the results obtained from planning practice showed that there was a world of difference between what was advocated in theory by planners and the results obtained in practice.

The second group of reasons which affected planning during the 1970s and 1980s is related to several socio-economic transformations which occurred worldwide. It was seen that with the first major oil crisis of the early 1970s; the advance of neo-liberalism; world globalization; the fiscal crisis; and the privatization process; many governments had to reduce their role in society. That is, the interventionist philosophy which geared the action of governments during the welfare state period was gradually replaced by the logic of the markets, of free initiative, and of individuals.

As a result of the profound transformations which occurred in society, and of the shortcomings which were observed in the operation of planning activity, planning started to be the subject of intense and corrosive attacks. Many academics, and right wing politicians, started to argue that there was no longer a place for planning, since the functioning of the market would be able to bring about more efficiency and effectiveness in the allocation of resources than strategies put forward by a handful of professionals, because many of them had proved themselves to be out of touch with reality.

However, as the practical results of many purely market-oriented approaches started to become visible, what has been observed is that such arguments do not reflect reality. It was shown in this chapter, and it will be seen again in the following one, that there is growing awareness that markets have proved unable to cope with all problems, since their 'invisible hands' are unable to take into account things such as public goods, externalities, indirect effects which spill over from their functioning, long-term sustained growth, etc (see also section 3.2.5). This is the reason why it was shown before that even private sector operators have sought for more action from governments, in order to avoid the pitfalls produced by the functioning of market; this also explains the reason why it is possible to observe in the mid-1990s a rapid revival of planning activity (see, for instance, Thomas and Kimberley, 1995, in section 2.4.1).

Nonetheless, what is also argued in this chapter is the fact that the growing importance of planning should not be confused with steps backwards towards the extensive planning styles undertaken in previous decades. On the contrary, what is shown here is that the new planning styles which are emerging worldwide are characterized by recuperating some of the ideas on which rational planning was supported, such as the need to look for the 'best' utilization and allocation of resources; however, the new planning attitude which is emerging worldwide is naked of the pretentious 'rational' and 'scientific' attitudes which characterized planning activity in previous decades, since there is growing recognition that planning is a contextual activity, because it is undertaken according to the circumstances of each place, and is also political, because the allocation of resources is undertaken not according to scientific reasoning but, instead, according to beliefs, culture, and ideology. In addition to that, the new planning styles (or even a new paradigm) which must be reinvented in the future must be matched with the market rationale, since it is the market ideology which will dominate Western and Eastern societies in the foreseeable future. This is the reason why the new planning forms which must be put forward in the future are labelled in this thesis as forms of 'deference planning'.

Taking into account that improvement must be introduced in the way in which planning is to be undertaken in the future, this chapter set out to examine key areas to which planners have to pay particular attention. With regard to this, it was found that the improvement of planning activity

comprises notions, such as the need to look for better informed solutions; the need to bring together into the planning process public and private sector organisations; the need to look for more pragmatic forms of planning; the need to bring the citizens into the core of the decisions; and the need to look at problems not only on a micro scale but, instead, in a macro and transnational perspective (see section 2.4).

However, the second argument which is offered in this thesis, and to which planners do not pay particular attention, is that the improvement of planning activity does not depend only on its 'procedural component', but also on the 'administrative component' in which it is carried out. With regard to this, it is the objective of this thesis to show that the efficiency and effectiveness of planning may be substantially improved if the administrative component in which planning is undertaken starts to be seen alongside the procedural issues. This is the reason why the two following chapters will pay particular attention to the different organisational frameworks in which planning may be carried out (chapter 3), and will also examine whether the potential which is offered by forms of organisation based on the network philosophy may improve the efficiency and effectiveness of the planning activity (chapter 4).

Chapter 3

Organisational structures - hierarchies and markets

3.1 Introduction

In the previous chapter it was shown that planning has evolved from an activity mostly concerned with making plans towards an integrated and corporate view of the system. It was also seen that, contrary to other sciences, planning is a volatile profession which seeks to answer the demands of a changing society. The events which marked the evolution of society over the last two decades were then examined with the objective of exploring ways in which planning process may be improved in the future.

However, what was also argued in the two previous chapters was that the improvement of planning activity may not be tackled only in terms of improvement in the procedural component in which planning is undertaken, but also in terms of the administrative framework in which planning process is carried out. This chapter, as well as the following, will demonstrate that many of the shortcomings faced by planning activity, as well as the new variables with which nowadays planners have to deal (see chapters 1 and 2), may be approached by redesigning the organisational framework in which planning is undertaken, the reason why this argument is in the core of the research objectives of this thesis (see section 6.2).

For instance, it will be demonstrated that issues linked to public participation, the need to reduce costs, the need for more pragmatic planning approaches, the need to speed up the planning process, the need to set up a new relationship between public and private sector organisations, and the need to make planning more adjusted to the new world's realities, better

informed and more democratic, may be overcome by changing the organisational framework in which planning process is carried out. This serves to explain why this chapter will assess the way in which organisational frameworks influence the way in which planning activity is carried out, while the following chapter will look at an alternative organisational structure which seems to offer great advantages to the operation of planning ('networks' - see chapter 4).

It is then the aim of this chapter, as well as of the next one, to discuss how society has evolved and how changes have prompted the evolution of planning, as well as the continuum of replacement of the paradigms discussed in the previous chapter. With this aim, section 3.2 draws attention to the fact that the main outcomes from the post-Industrial Revolution society were linked to rigour, discipline and rationality. Accordingly, the classic and rational paradigms that dominated planning up to the 1980s were implemented by organisations founded on rigour, discipline and rationality. To this form of organisation (that roughly speaking comprehends the classical and rational phases discussed in the previous chapter) is given the name of hierarchies, bureaucracies or Weber's rational model.

It is also seen in the second part of the chapter (section 3.3) that society has been subject of profound changes since the 1980s on account of, for instance, neo-liberalism, world globalization, information technology, etc. As a result of that, the former model, based on rigour, rationality, excessive discipline, etc, has proved outdated. It is also illustrated that nowadays the tendency is for organisations to become more flexible, creative, and interconnected with the surrounding environment. By describing those changes it will be clear why some of the most important issues dominating the agenda of the planners (as discussed in section 2.4), are linked to matters such as world globalization; the need for more comprehensive, creative, and democratic planning approaches; why planning is nowadays concerned with the full utilization of human resources, instead of being dominated by few core bureaucrats; why the top-down regional development paradigm has been shifted towards an horizontal one; and why there is nowadays a growing tendency towards procedural planning styles to the detriment of the substantive ones.

3.2 The bureaucratic and regulatory model as the dominating paradigm in society up to the 1970s

3.2.1 Origin and characteristics of Weber's hierarchical model - top-down organisations

In the previous chapter (section 2.2.1), the profound changes in society prompted by the Industrial Revolution were discussed, one of which being that large numbers of people moved to towns. As documented by Cherry (1970), only between 1821 and 1851 over 4 million of people in England moved to urban centres. Indeed, in the aftermath of the Industrial Revolution the number of people living in towns increased very rapidly, and most Western countries had to start looking for new organisational structures able to accommodate and coordinate an expanding urban society.

King (1986) provides a good discussion of the effect of the Industrial Revolution on the organisation of society. In four chapters focussing on the development of, what he calls, the 'Modern State', he describes the organisational structures in the advent of the Industrial Revolution and the influence, among others, of Marx, Lenin, Durkheim, and Weber on the organisation of society in the post-Industrial Revolution era (King, 1986; pp. 31-140).

In particular, Durkheim's theories, addressing the theme of the division of the organisation of labour in society, have contributed much to explaining the emergence of 'Modern State' (see for instance Durkheim, 1984; 1982; 1960). According to him most of the 'mechanical solidarity' created before the Industrial Revolution was linked to family, friends and neighborhood links, even nowadays observed in some isolated and rural areas, where the network of family ties and friendship is particularly intense. Durkheim (1984; p. 79, 87) claims that the pre-Industrial Revolution phase was characterized by the existence of 'negative or abstaining relationships', because *no real co-operation between (the individuals) existed since the burdens were laid upon one of them alone. Yet, co-operation is not completely absent from the phenomenon; it is merely gratuitous or unilateral. For instance, what is a gift if not an exchange without reciprocal obligations?*. To the sum of all these mechanical relationships Durkheim gives the name of 'domestic society' (Durkheim, 1984; p. 79)

In opposition to the 'negative or abstaining relationships' of the pre-Industrial Revolution period Durkheim describes the post-Industrial Revolution phase as the era of the 'organic society'. According to him, after the Industrial Revolution the relationships set up among individuals became cemented on division of labour. That is, rather than based on family or

friendship ties, after the Industrial Revolution relationships became dependent on 'economic', 'administrative' and 'governmental' functions (Durkheim, 1984; p. 87).

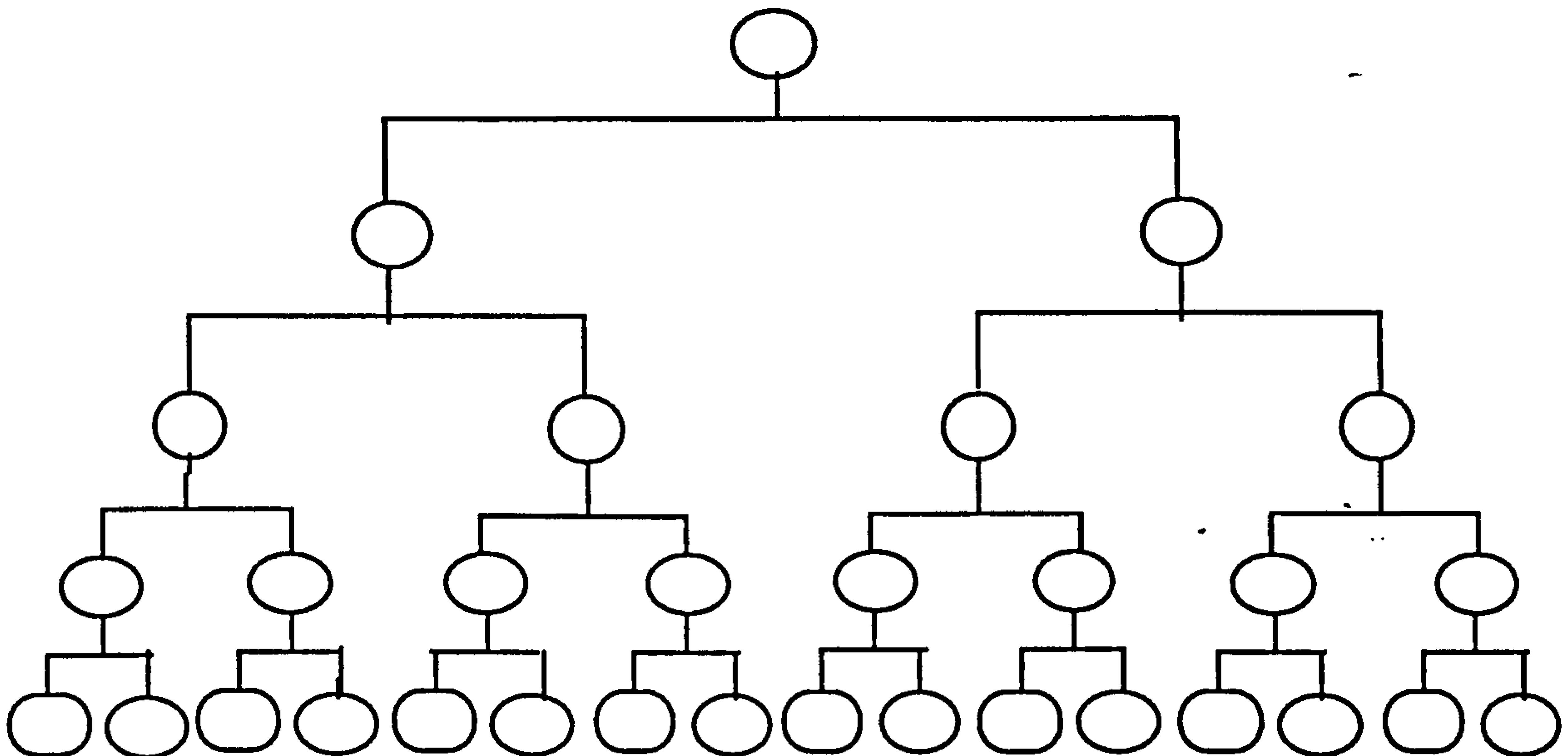
In fact, most of the affective links of the former rural and feudal societies were broken down as people started to live in large urban agglomerations. In an emerging society characterized by mixing people from different socio-economic strata, living styles, and with few family links, most of the relationships established among individuals became impersonal and linked to labour and business. In other words, and following Durkheim's terminology, most people moved from a 'mechanical' to an 'organic' society.

Marx's and Lenin's leftist philosophies also had a strong influence on some social movements which emerged after the Industrial Revolution, principally among those particularly concerned with the poverty and promiscuity which had developed in its early stages. In particular Marx's philosophies boosted the development of some town planning approaches, linked to utopian and philanthropist movements (e.g., the agricultural villages of Robert Owen, the three magnets of Ebenezer Howard, etc) (for an expanded analysis see section 2.2.1). In terms of organisation of society, Marx's and Lenin's philosophies were also an important source of inspiration to the implementation of 'scientific socialism' and the 'central planning' organisation in Russia and in other former eastern communist countries, brought to power by the 1917 Russian Revolution (for an expanded analysis of the characteristics of the central planning systems see section 1.5).

It was however Weber's bureaucratic model, which shows many similarities with Durkheim's theories, that most influenced, and is still influencing, the organisation of society since the Industrial Revolution, both in the Western capitalist and in the former communist block countries. According to Weber (1864-1920), and also in accordance with Durkheim, the success of post-Industrial Revolution societies, would largely depend on its organisation. To King (1986; pp. 70-71), *Weber regarded modern state institutions as essential for ordering complex societies whatever their political colouring*. Discipline, rationality, organisation, and scientific management were amongst the main cornerstones of Weber's model. A schematic representation of Weber's bureaucratic model is presented in figure 3.1

According to Weber (1948; p. 180) *the structure of every legal order directly influences the distribution of power, economic or otherwise, within its respective community. This is true of all legal orders and not only that of the state*. In addition to this Weber states that discipline should be introduced in the operating philosophy of all organisations. According to him, *no special proof is necessary to show that military discipline is the ideal model for the modern*

Figure 3.1 - Example of an hypothetical bureaucratic organisation
(tall structure)



Source: adapted from Vechio (1988, p. 446)

capitalist factory, as it was for the ancient plantation. In contrast to the plantation, organisational discipline in the factory is founded upon a completely rational basis (Weber, 1948; p. 261). Clarifying what is meant by discipline he says that the content of discipline is nothing but the consistently rationalized, methodologically trained and exact execution of the received order, in which all personnel criticism is unconditionally suspended and the actor is unswervingly and exclusively set for carrying out the command. In addition, this conduct under orders is uniform (Weber, 1948; p. 253).

The bureaucratic organisation proposed by Weber may also be summed up by the following four main characteristics (Beetham, 1991; p. 130; Vechio, 1988; pp. 450-454): hierarchy, continuity, impersonality, and expertise. 'Hierarchy' means that each official has a clearly defined competence within a hierarchical division of labour, and is answerable for its performance to a superior. Following Mitchell (1991; p. 105/6) *hierarchy presupposes an already determined outcome or purpose; the underlying idea of hierarchy is that such an outcome can be broken down into a set of sub-processes. So, hierarchy depends upon ideas of organisation, task specialization and rationality. (...) Hierarchies are, therefore, coordinating mechanisms, based on the subdivision of tasks, the pyramidal structure of organisation, the nature of the individual activities within such large organisations, the mechanisms of control and communication, the gradation of autonomy, and so on.*

In the hierarchical model proposed by Weber it is also supposed that *each level of hierarchy directs the action of those 'lower down', ultimate authority resides with those at the 'top', and at each level those involved carry out more narrowly defined tasks with less and less autonomy* (Mitchell, 1991, p.106).

By 'continuity' is meant that *the office constitutes a full-time salaried occupation, with a career structure that offers the prospect of regular advancement*, but, due to its hierarchical structure, it also means that *members of a bureaucracy are always appointed from above* (Beetham, 1991; p. 130/1)

The 'impersonality' created by bureaucracies arises from the fact that *the work is conducted according to prescribed rules, without arbitrariness or favouritism, and a written record is kept for each transaction*. Such a situation ensures that *there is no favouritism either in the selection of personnel, who are appointed according to merit, or in administrative action, which is kept free from the unpredictability of personal connections* (Beetham, 1991; p. 130/2). In addition to that it is also recommended in the model that managers should *maintain an air of impersonality towards employees (...) to ensure that rational considerations were on the basis for decision-making rather than favouritism or personal prejudice* (Vechio, 1988; p. 451)

'Expertise', and 'record keeping' means that *officials are selected according to merit, are trained for their function, and control access to the knowledge stored in files* (Beetham, 1991; p.130) in order to *check on past performance and to record decisions and rules* (Vechio, 1988; p. 451).

In short, the bureaucratic model proposed by Weber can be described as *the coordination and execution of policies and systems of administration as an arrangement of offices concerned with translating policy into directives to be executed at the front line of an organisation (shop floor, coal face, battlefield and so on)* (Beetham, 1991; p. 130).

3.2.2 The prominence of Weber's bureaucratic model in the organisational structures set up after the Industrial Revolution

As described before (section 2.3.1), it was believed after World War II that the reconstruction and economic expansion of the world could only be achieved by the implementation of approaches capable of bringing together all participants into the same enterprise. Planners were then viewed by public and private sector organisations as having the right profile for the job, on account of their broad background (see section 2.3.1). Likewise, Weber's bureaucratic model

was seen as offering great potential, since it allowed the coordination of massive numbers of people around the same objectives.

Commenting on the advantages brought about by Weber's 'rational' and 'scientific' management to the world and in particular to America, Osborne and Gaebler (1993; pp. 14-15) argue that *during times of intense crisis - the Depression and two world wars - the bureaucratic model worked superbly. In crisis, when goals were clear and widely shared, when tasks were relatively straightforward, and when virtually everyone was willing to pitch in for the cause, the top-down, command-and-control mentality got things done. The results spoke for themselves, and most Americans fell in step. By the 1950s America became a nation of 'organisation men'.*

It was not only in America that the bureaucratic model created by Weber was successfully applied. Indeed, after World War II large numbers of businesses started to grow very rapidly all round the world. To this growing business Weber's model offered the right approach for standardizing products and for reducing costs. It will also be seen later, while describing the rise of the dictatorship in Portugal (chapter 5), that Weber's model was also used in regimes ruled by dictatorships, since the model provided the right framework to ensure the full political control of society, and to develop the sense of nationalism, the reason why some people have also associated Weber's model with the flourishing of Nazism in Germany (see King, 1986, p. 72).

The organisation of society after the Industrial Revolution started to assume different forms. Indeed, before the Industrial Revolution society was organized on clusters of feudal and/or rural communities, that is in a 'mechanical way' ('ad-hoc' organisation) (see section 3.2.1). Conversely, the success of the post-Industrial Revolution society was linked to the coordination of large numbers of (urban) people. In opposition to the previous ad-hoc structures, society had to become rigorously coordinated, such as in terms of opening and closing times of companies and commerce, division of tasks, levels of organisation, organisation of the housing sector (planning), obligations and rights (law), etc. In other words, for an increasingly organic society the coordination and regulation characteristics of Weber's model offered the right approach to make society a 'high precision machine'.

The need for coordination and organisation was even more noticeable after World War II. Indeed, the 1950s and 1960s were characterized by strong economic expansion. Large corporations started to flourish (e.g., car industry, aviation, chemical industry, steel industry, etc) and competition and efficiency became the cornerstones of success.

To the demands created by the post-Industrial Revolution society Weber's bureaucratic model offered the possibility of ensuring high levels of precision and coordination. This is the reason why Weber's bureaucratic model was widely adopted in many fields and situations ranging from small to large size organisations, and from public to private sector organisations. For instance, and as pointed out by Ratcliffe (1974) (see section 2.2.1), the planning system adopted in the UK after 1947 was based upon a rigorous administrative structure, a situation which finds its origin on Weber's philosophies. Even nowadays, Weber's model is still of great use in many areas. In order to support this claim Beetham (1991; p. 130) answers with the following question: *what do the Vatican and General Motors, NASA and the British NHS have in common? Weber's answer to this question would have been simply: they are all bureaucracies* (Beetham, 1991; p. 130).

Weber's 'rational' and 'scientific' model had also a profound effect on the structure of most organisations. Thereafter, principally large size organisations, such as large corporations and governments, started to organize their operations under a hierarchical 'top-down' approach (Vechio (1988; pp. 444-454), names the top-down structures as 'tall structures'). Indeed, a pyramidal structure, as represented in figure 3.1, was adopted in most organisations after the two World Wars. The top occupied by a restrict number of bureaucrats responsible for taking all decisions within the organisation. Linked, and answerable, to the top, a ladder with a variable number of inferior levels responsible for implementing decisions taken by core bureaucrats.

It was not only to business that the bureaucratic model offered great advantages. Indeed, to the classic and rational planning paradigms created in the post-Industrial Revolution period (see sections 2.2 and 2.3), Weber's model offered the idea that systems could be addressed under a rational and systematic way (the later reflects the notion of discipline). Inspired by that, most planners started arguing that actions should be based on rigour and scientific steps. According to them, that would afford the introduction of rationality, efficiency and effectiveness into the town planning approaches. This is what is discussed in the following section.

3.2.3 Influence of the bureaucratic model on the planning approaches undertaken up to the 1970s (classical and rational planning)

Looking at the 'classic' and 'rational' planning approaches set up after the Industrial Revolution (sections 2.2 and 2.3) and Weber's model (section 3.2.1) it is now easy to conclude that a number of principles underpinning the post Industrial Revolution planning approaches were strongly tied to the bureaucratic model created by Weber. For instance as in Weber's model

classic and rational planners also advocated the development of 'rational' and 'scientific' approaches to address problems. In addition, whilst classic and rational planners claimed that solutions should be left in the planners' hands, Weber also argued that organisations should be exclusively commanded by top level managers.

Yet, Weber claimed that the *growth of bureaucracy was associated with the growth of legality and the rule of law* (Mitchell, 1991; pp. 105-106). Likewise, planners viewed their approaches legal and democratic since problems were addressed under a 'neutral', 'scientific' and 'rational' way (see section 2.2.1). Therefore, both in Weber's and in the planners' approaches public participation was completely ruled out.

Also, the rational and classical planning approaches were based on strict package steps *with the prospect of relief from the discomfort of ambiguity and of having to decide things in the face of conflicting evidence and competing want* (see Faludi, 1987, section 2.3.1). Similarly, *Weber felt that a strict hierarchy of authority and reliance would facilitate greater efficiency* (Hague, 1980; p. 23/4).

Commenting on the efficiency of the bureaucratic model, Weber claimed that *experience tends to show that the purely bureaucratic type of administrative organisation is, from a purely technical point of view, capable of attaining the highest degree of efficiency (...) it is superior to any other in precision, in stability, in the stringency of its discipline, and in its reliability (...) the fully developed bureaucratic mechanism compares with other organisations exactly as does the machine with the non-mechanical modes of production* (Weber, in Beetham, 1991; p. 131-2). Likewise, planners saw the rational model as a superior manhood achievement, a kind of *fourth power able to curb the irrational decisions of politicians* (see Sarbit, 1983, section 2.3.1). Planners were then viewed as a kind of administrative being making rational decisions as does the 'economic man' (see section 2.3.1). Similarly, Weber defended the idea that *members of a bureaucracy are (...) responsible to the governing body for the execution of its policy and the administration of its funds (...) under a rational and scientific way* (Beetham, 1991; p. 131; Weber, 1948; p. 253).

3.2.4 'Top-down' development strategies - the 'centre-down' paradigm

The top-down approach underpinning Weber's model had also a strong impact on the main regional development paradigm emerged after World War II.

Indeed, the dominating regional planning paradigm after World War II was the 'centre-down' development perspective. The centre-down paradigm finds its roots on Perroux's theory of the 'growth poles' ('pôles de croissance') (Perroux, 1955), and, according to Hansen (1981; p. 15), until the early 1980s it *dominated spatial planning theory and practice*. This model was adopted and expanded in the regional development literature by other widely quoted economists, such as Friedman and Richardson (for an expanded analysis see Friedman, 1972; Richardson and Richardson, 1975; and Richardson, 1976).

Following Boudeville (in Richardson, 1969; p. 417) a growth pole may be defined as *a set of expanding industries located in an urban area and inducing further development of economic activity throughout its zone of influence. The essential position is that development (whether spontaneous or induced) (...) will (or hopefully should) spread over time to the rest of the spatial system from core to periphery* (Hansen, 1981; p. 15).

The link between the growth pole theory and Weber's bureaucratic model is clear. That is, both in Weber's and in the growth pole theory it is suggested that development can be conveyed throughout the territory from centre to periphery, through hierarchical, and uninterrupted, communication channels (notion of 'spillover effect'). In other words, development in peripheral regions may be achieved by inputs induced from core organisations.

It is nevertheless interesting to notice that despite the close links between the growth pole theory and Weber's bureaucratic model, the growth pole theory has also influenced some of the policies supporting the market-led approaches that will be discussed later (section 3.3). Evidence for this is found, for instance, in a paper published by Peck and Tickell (1995). Basing their analysis on the British situation these academics illustrate that most of the policies put forward under the neo-liberal approaches implemented during the 1980s, where based on the assumption that markets can create areas of self-sustained growth, and also that the development produced within them soon or later spills over to other parts of the territory.

A main difference may, nevertheless, be noticed between the philosophy supporting the implicit or explicit strategies based on the growth pole theory before and after the 1980s. Before the 1980s, the growth poles strategies were supposed to be supported by government (e.g. injection of public money in some regions, implementation of strategic planning policies, creation of development planning committees, etc). However, from the point of view of the neo-liberals public intervention should be ruled out. That is, neo-liberals believe that only self-sustained development is able to induce further development. In other words, markets are able to create self-sustained areas from which, subsequently, innovation and development spill over to other parts of the territory.

Reviewing some research conducted into the socio-economic transformations operated in England during the 1980s, Peck and Tickell describe how Thatcherism stimulated the creation of an important hub of development in the South East region². However, they also claim that such a political approach has proved a *failed or failing regulatory experiment* (p. 15) on account of two main reasons.

Firstly, empirical evidence illustrates that the real growth observed in the South East region was followed by negative growth in other areas (e.g., West Midlands, Scotland, Yorkshire and Humberside, North and North West), a situation which deepened even further the already uneven British regional development process. Secondly, although achieving positive results in the South East, such policies were, nevertheless, overshadowed by the deterioration of living conditions (e.g. congestion, pollution, reduction of open space, etc). In addition to this, and for speculative reasons, the price of some products in the South East increased very rapidly. For instance, whereas between 1985-87 house prices rose by 6% in the Northern region, in the same period they went up by 47% in the South East. (for an expanded analysis of the pros and cons of the centre-down development effects produced by regions guided by market-led approaches see also Massey and Allen, 1988; Allen, 1992; and Rodwin and Sazanami, 1991).

3.2.5 The welfare state philosophy and the rationale behind the governments' intervention on markets

Another perspective which was developed after World War II that decisively influenced the actions of governments in a number of Western countries was that of the welfare state philosophy. Indeed, a number of politicians and economists argued after World War II that government should intervene in markets due to 'market failure'.

One of the main defenders of state intervention in markets is Galbraith. In a book entitled 'The Age of Uncertainty' (Galbraith, 1977), and in accordance with Marx, Schumpeter, Keynes and Beveridge, he discusses some of the most important market shortcomings as well as the reasons why states should intervene in markets and orient their approaches towards a welfare state perspective (see also Wolf, 1988; Levacic, 1991; Breitenback et al, 1991).

² It is claimed in literature that the South of England, and in particular the South East region, is amongst the British regions that have most benefited from Lady Thatcher's policies (for an expanded analysis see Peck and Tickell, 1995).

Following Galbraith, government should intervene in markets for three main reasons ('theory of market failure'). First, markets tend to be inefficient when dealing with externalities and public goods. Second, market approaches imply that all entrepreneurs have equal access to information when in practice that is not true. Third, governments should intervene in markets in order to promote more social equity.

In relation to the market's inefficiency in dealing with externalities, the supporters of the welfare state argue that *where economic activities create 'spillovers', whether benefits or costs, that are not, respectively, appropriated by or collectible from the producer, then market outcomes will not be efficient* (e.g., education, research and development, pollution, etc) (see, for instance, Levacic, 1991, pp. 36-41; Wolf, 1988, pp. 20-23). Despite the fact that this criticism is usually applied to manufacturing, it is, nevertheless, found that it remains valid when applied to fields such as tourism.

Indeed, due to the amalgamation of products included in the tourism industry (see section 1.4), tourism is highly demanding of products and services provided by other sectors (e.g., construction, transport, food and beverage, handicrafts, culture, banking, telecommunications, etc). In a number of studies focussing on the tourism economic impact it is shown that the indirect and induced impacts produced by tourism ('multiplier effect') may be large, only depending on the nature of the economic base ('linkage effect') (for an expanded analysis see Archer, 1977; Fletcher and Archer, 1991; Archer and Fletcher, 1988 and 1990; Fletcher and Snee, 1989; WTO, 1982; Wanhill, 1988; Bringuglio, 1992; Khan et al, 1990; Mathieson and Wall, 1982).

However, it is also suggested in literature that in a number of situations private sector organisations fail to optimize these spillover effects because they tend to create little interlocking (low coordination), and, also because the benefits arising from the indirect and induced impacts are difficult to understand in a short-term perspective. These two arguments are used to support government intervention in markets. Based on the Portuguese situation chapters 7 and 8 will attempt to expand on these two issues by bringing evidence on whether organisations create closer links among each other and, thus, tend to optimize such benefits, or whether there is indeed a need for some external action in order to stimulate the creation of closer links among organisations.

Literature has also suggested that the tourism development process may jeopardize the environment, by producing negative impacts on nature (e.g., fauna, flora, water, air, noise, congestion, etc) (Mathieson and Wall, 1982; Croal, 1995; OECD, 1980; Costa and Rosa Pires, 1992; Buckley and Pannel, 1990; Cohen, 1978; EIU, 1992; Farrel and Runyan, 1991; Getz,

1983; Green and Hunter, 1992; Brierton, 1991), and on society and culture (e.g., drugs, prostitution, demonstration effects, acculturation, etc) (De Kadt, 1979; WTO, 1981; Doxey, 1975; Cohen, 1992; Pearce et al, 1991; Smith, 1989 and 1990; ADC/TLC, 1989; Caneday and Zeiger, 1991; Ross, 1992; Schroeder, 1992; Grahn, 1991; Aquino, 1987; Henry, 1989; Holder, 1989; Harrison, 1992; Rogers, 1989; Chick, 1991; Boniface, 1995).

The evidence that tourism may impinge on the environment and society because they are non-priced ('public goods'), has also supported those who defend state intervention in markets. Again, based on the Portuguese situation chapters 7 and 8 attempt to bring empirical evidence to this matter by evaluating whether priceless tourism products are taken into account in the planning and management of the tourism sector.

Second, a market philosophy implies easy and equal access to information. However, *where consumers do not have equal access to information about products and markets, where information about market opportunities and production technology is not equally available to all producers, or where factors of production are restricted in their ability to move in response to such information, market forces will not allocate efficiently and the economy will produce below its capacity* (Wolf, 1988; p. 26; see also Levacic, 1991, pp. 43-45).

In the tourism field an optimal allocation of resources would imply that operators have easy access to information concerning, for instance, investment opportunities, characteristics of demand and supply, regulation, and so on. In other words, markets could operate efficiently if these requisites were fulfilled. Again, this is a matter that, based on the empirical evidence brought from Portugal, is discussed later (chapters 7 and 8). It is then examined whether or not markets offer enough transparency, capable of ruling out the state interventions claimed by Galbraith (1977) and other supporters.

Third, markets are not sensitive enough to cope with problems linked to poverty, regional imbalances, less protected groups, etc, because, under a market perspective, the allocation of resources and the level of interaction (competition) among organisations only depends on their competitive capacity (Wolf, 1988, pp. 28-29; Breitenbach, 1991, pp. 48-52). Under an organisational point of view this means, for instance, that states should intervene in order to ensure that those groups with smaller bargaining capacity (e.g., non-profit organisations and independent groups) are also accountable to the decision-making and taking process. Again, the empirical analysis brought from Portugal will help to understand whether there is in fact a need for state intervention in this matter or, alternatively, whether markets contain self regulatory mechanisms capable of developing inclusive approaches embracing all organisations (see chapters 5, 7, and 8).

3.2.6 Structure and organisation of hierarchies - the case of the tourism organisation

It is on the basis of these three main philosophies, i.e. Weber's hierarchical model, the growth poles theory and the welfare state philosophy, that a number of governments have justified the way and the reasons by which they intervene in society. As pointed out by Jaques (1991; p. 108) such interventions are based on the assumption that they *can release energy and creativity, rationalize productivity, and (...) improve morale.*

Following then some of the principles introduced above most governments organize their administration under a hierarchical structure, as represented in figure 3.1. Such organisational structures, common to a number of countries, include a national level, responsible for setting up the national policy, to which a variable number of regional and local authorities are attached, and report to, and whose levels of autonomy, power, and link to the national government, vary from country to country, depending on its economic structure and development, political colouring, sociocultural cohesion, etc.

The hierarchical or top down structures bring governments the following advantages. To begin with, they ensure that policies set up at the national level are implemented downwards by all organisations. In particular, hierarchies afford that *'impulses of economic change' are transmitted from higher to lower centres in the hierarchy* (Hansen, 1981; p. 21). Also, and in opposition to the ad-hoc structures typical of feudal and rural societies, a hierarchical organisation ensures governments that all parts of the territory follow a single, and therefore coordinated, national policy. Compared to ad-hoc structures hierarchy also affords a stronger inter-sector liaison among all parts of the territory.

Furthermore, hierarchy ensures that *innovation is diffused to peripheral regions from the core, and core-region growth will tend to promote the development process of the relevant spatial system* (Hansen, 1981; p. 20/1). To Hansen, this is particularly important when *areas of economic backwardness are found in the most inaccessible areas* and when induced growth may be viewed as *a means for linking lagging regions more closely with the national system of hierarchical filtering and spread effects to the hinterland.*

Yet, hierarchy allows the implementation of the 'social policies' defended by the supporters of the welfare state. With the development of the welfare state after World War II there were indeed a number of politicians, sociologists, economists, planners and so forth, who claimed that governments should intervene in the regional development process in order to avoid wide regional disparities. For instance, Hirshman (1958) argues that following the growth pole (and

the hierarchical) theory *the entire urban system (may) become more tightly integrated in the national innovation adoption process*. Williamson (1965) goes even further on this claim by stating that *regional convergence and a disappearance of severe dualism are typical of the more mature stages of national growth and development*.

Finally, linking all parts of the territory to a national government hierarchy may contribute to the creation of a higher national cohesiveness and thus to what Ohmae (1995) calls the 'rise of the nation-state'. As suggested by Weber (1948; p. 176) under a hierarchical model *people can be melted together through common destinies*. In addition, the communication channels set up under hierarchies may work as conveyors of information and thus bring more transparency to the operations of private and public sector organisations.

The hierarchical structure created by Weber has inspired an amount of literature focussing on the way in which organisations should be set up. For instance, it is suggested in literature drawing on tourism organisation that, in accordance with Weber's recommendations, organisations should be set up following three (main) hierarchical levels (for an expanded analysis see Pearce, 1992; Atkins, 1989; Adams, 1990; An Foras Forbartha, 1966; Wahab, 1988; Inskip, 1994; Inskip, 1991; Gunn, 1994; Holloway, 1989; Burkart and Medlik, 1981; and Murphy, 1985; Costa, 1991a; Lickorish, 1984).

On the top, a national government responsible for defining the national policy; for establishing the national standards for the hospitality industry and for tourism education; for coordinating the international marketing and promotional actions; for setting up the main tourism aims in terms of planning and development such as national accessibility, areas of priority tourism development, environmental protection, tourism accommodation, etc; for direct or indirectly supporting, and stimulating, the financing of tourism; and for designing the environment in which the tourism industry should operate (regulation).

Linked to the national level a variable number of regional organisations responsible for translating national policy to the particularity of each region; and for setting up, regional policies, including marketing, promotion, planning, development, education and financing, according to the guidelines established by the national organisation.

Finally, a local level, which, in accordance with the policies defined by national and regional organisations, should be responsible for the implementation of the national and regional strategies; by pointing out the areas where the tourism equipment and infrastructure should be erected (tourism zoning); by ensuring that the tourism industry respects the social, cultural, natural, economic, and aesthetic characteristics of each place; and by creating symbiotic links

between 'hosts' and 'guests' (e.g., by the development of shared and multipurpose facilities; avoiding congestion effects; establishing top limits to local developments; signposting tourism and non-tourism facilities in order to avoid the massive convergence of tourist flows to areas of higher accessibility; providing additional car parking areas, public toilets, etc; creating conditions for the expansion of private sector facilities namely in terms of public telephones, cash points, etc).

It is following these principles that most countries have decided to establish their tourism organisations. As particularly well documented by Pearce (1992), Atkins (1989), Wahab (1988), Adams (1990), An Foras Forbartha (1966) and the periodicals published by the OECD reporting on 'Tourism Policy and International Tourism' (OECD, s/y), most tourism organisations set up worldwide comprehend these three hierarchical levels. There are though situations where, owing to the size of the country or level of tourism development, there is also the need for other intermediate levels, such as a sub-regional level, when a country is too large, or, below the local organisation, specific site planning for individual tourism developments when the tourism industry develops strong pressure on some particular local resources (for an expanded analysis see Inskip, 1991, pp. 36-37).

As will be seen further, there are also situations in which tourism at the local level is undertaken in parallel with other policies, such as housing, transportation, water and power supply, etc (e.g. England). Conversely, there are cases in which specific tourism organisations are set up, such as in areas where tourism is responsible for introducing particular pressure on the local environment (e.g. Portugal). However, some weaknesses may be pointed out in the efficiency and effectiveness of that approach (see chapter 5 and in particular section 5.3.2.5.4).

The discussion that follows describes the tourism organisation of the 12 EU countries. As illustrated, most tourism organisations in Europe follow the three-floor top-down approach created by Max Weber. Particular attention is placed on the cases of Portugal, England, Germany and Spain to show that, though embodied in different political and administrative frameworks (Germany is a federal country, Spain is a semi-federal country and there is no autonomous region either in England and mainland Portugal), in all situations the tourism organisation is dominated by top-down hierarchies. These cases were picked up just as examples. Nevertheless, a similar analysis could be extended to other countries. Since the central theme of this research is planning, in addition a complementary analysis of the role developed by national, regional and local organisations in the tourism sector is provided.

Although showing differences from country to country, it is noticed that the tourism organisation in 11 out of the 12 EU countries follows the hierarchical model developed by

Weber (figure 3.2). Most of the differences observed mirror differences in the countries' socio-economic structure and development, size, political and administrative organisation, traditions on power devolution to lower levels of the administration ('federalism'), etc.

Indeed, looking at the tourism organisation in the twelve EU countries (figure 3.2), one may notice that Greece (see figure 3.2, 'variable 3') is the only member state where the tourism organisation does not follow the three floor top-down approach adopted by all the other 11 EU countries (Atkins, 1989; Briassoulis, 1993; Liupi, 1985; OECD, s/y). In fact, in Greece all responsibilities are concentrated in the Greek national tourism organisation (e.g., planning, development, promotion, preparation of studies and statistics, regulation, information centres, preservation of the natural and cultural assets, and transport).

Conversely, in all the other 11 EU countries the structure of the tourism organisation follows the three floor top-down approach discussed before (figure 3.2, 'variable 3'). Even in Luxembourg, the EU's smallest partner, the national government decided that a three floor hierarchical structure would be adjusted to the country (figure 3.2, 'variable 3'). Also in Ireland, where, compared to the other EU countries, the number of international tourist arrivals is smaller, the Irish government also decided to implement an administration comprising national, regional and local tourism organisations (figure 3.2, variables 3 and 5).

(i) Portugal

The tourism organisation in Portugal follows, at least apparently, the hierarchical top-down approach noticed in the other countries. In particular, and as will be expanded in chapter 5, tourism at the national level is under responsibility of a Minister (Ministry of Industry, Trade and Tourism) and a Secretary of State, the highest level that a department might reach within the Portuguese administration (figure 3.2, variable 2). Due to its economic importance tourism in Portugal is viewed as a priority sector (figure 3.2, variable 1).

As in England, the regional tourism organisation in Portugal is undertaken by RTBs. Although responsible for a wide diversity of matters (some planning and development, and marketing and promotion), most of the activities carried out by the RTBs are linked to promotion, due to their small budgets and lack of qualified staff. In addition to that, their link to the national government is very weak, making the exchange of information, the coordination of policies, and the implementation of the national tourism guidelines to the requirements of the regions an authentic nightmare (for an expanded analysis see chapters 5, 7 and 8).

Figure 3.2 - Tourism organisation in the twelve EU countries

	V1	V2	V3	V4	V5
Belgium	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
Denmark	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
France	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
Germany	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
Greece	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
Ireland	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
Italy	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
Luxemb.	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
Netherlan.	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
Portugal	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
Spain	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
U.K.	Very important (government tied to tourism; tourism is amongst the government's priorities)	Important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)	Ministry of Tourism (there is a minister in charge of tourism affairs)	Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)	No Ministry (tourism is not under the direct or indirect responsibility of any ministry)

n.a - not available

- V1 (Variable 1) How the tourism sector is viewed by the government
 very important (government tied to tourism; tourism is amongst the government's priorities)
 important (government sees tourism either as important but not paying special attention to it; or government does not see tourism in a particular way but it is nevertheless interested in maximizing its benefits)
 Not important (government is not aware or does not pay attention to tourism)
- V2 (Variable 2) How tourism is represented at the ministerial level
 Ministry of Tourism (there is a minister in charge of tourism affairs)
 Other Ministry (there is no minister in charge of tourism; tourism is the responsibility of another ministry)
 No Ministry (tourism is not under the direct or indirect responsibility of any ministry)
- V3 (Variable 3) Structure of the tourism organisation
 Federal/National/Regional/Local levels (the tourism organisation includes federal and/or national, regional and local tourism organisations)
 Only some levels of the tourism organisation (the tourism organisation includes some of the national, regional or local levels but not all of them)
 Absence of tourism organisations
- V4 (Variable 4) Nature of the National Tourism Administration (NTA)
 Governmental
 Semi-governmental
 Private

(NOTE: The chart continues in the following page)

V5 (Variable 5) International Tourist Arrivals (Million, 1991)

- High volume of arrivals (over 15)
- Medium volume of arrivals (5 - 15)
- Low volume of arrivals (less than 5)

Sources: Pearce (1992); Atkins (1989); Alberta-Piñole (1993); Baker (1990); Briassoulis (1993); Costa (1991); Heeley (1989); Hill (1993); Pompl and Lavery (1993); Liupi (1985); Lewis and Williams (1991); OECD (s/y); WTO (s/y).

At the local level, the situation is even more bizarre. There are particular (and inefficient) local tourism organisations called 'Juntas de Turismo' and 'Comissões Municipais de Turismo' which operate within an outdated legislative framework enacted fifty years ago. Although there are some connections with the local authorities (municipalities), a situation which in theory allows their link to the other local policies (e.g., zoning, transportation, environmental control, town planning, etc), what in practice is noticed is that the 'Juntas de Turismo' and municipalities are poorly coordinated and often conflict with one with another. In addition, the Portuguese 'Juntas de Turismo' are not connected to the regional and national organisations, a situation which prevents an effective coordination of their policies with those set up by regional and local tourism organisations (for an expanded analysis see chapter 5).

In short, it is observed that, when compared to the other countries that will be described below (England, Germany and Spain), the Portuguese government has failed to implement an organisational system capable of linking national, regional and local organisations. As pointed out before, the link among national, regional and local organisations is particularly important to ensure that national policies are implemented by other lower level organisations; to allow the coordination of policies; to link more closely all parts of the territory; to promote the diffusion of innovation; and to support less developed regions.

(ii) England

As far as England is concerned the national tourism organisation is under responsibility of a Secretary of State and of two national tourism organisations (NTOs), that report to the Secretary of State: the English Tourist Board (ETB), with some responsibilities on planning, development and national promotion; and the British Tourism Authority (BTA), responsible for promotion abroad. At the regional level, and reporting to the ETB, there are 11³ RTBs responsible for tourism within their regions, with broad responsibilities in terms of marketing, promotion, commercial activities, information, preparation of regional tourism policies, financial aid, advising, studies and surveys, etc.

³ The 1969 Tourism Development Act created 12 RTBs in England. Meanwhile, one of them went bankrupt.

At the local level the tourism organisation is under the umbrella of local authorities. Its planning and coordination is done within 'structure' and 'local' plans. However, there are also local authorities which, in areas of strong tourism pressure (e.g., national parks, areas of outstanding beauty, historic centres, etc) set up specific plans for tourism ('management plans'). There are yet situations in which tourism at the local level is carried out by 'arms-length organisations', that is partnerships schemes involving private and public sector organisations (see Palmer, 1994). Most local plans often include actions oriented towards marketing and publicity, information and interpretation, planning controls, and traffic management. (for an expanded analysis of the English, and British, situation see also BTA, 1990; ETB, 1990; ETB, 1981; Cooper, 1987; Adams, 1990; Heeley, 1989; Atkins, 1989; Medlik, 1989; Cooper, 1987; Palmer, 1994; Costa, 1991)

Compared to Portugal and England a slightly different situation is observed in countries with federal traditions. It is nevertheless noticed that even in those cases the hierarchical three floor top-down approach is followed.

(iii) Germany

For instance, in Germany the devolution of power to the German federations (*Länder*) has marked most of the post-war German socio-economic development and national organisation. As pointed out by Baker (1990; pp. 41 and 89) there are 11 *Länder* in Germany each with *its own constitution (that) organize its own administration and local government differently. (...)* *As a result the size of administrative units, the regulations, the internal organisation are different from place to place.* In addition to this, and as pointed out by Pearce, because the main source of tourism in Germany is the outbound tourism (*by 1987 and estimated 69% of Germans aged 14 and over were taking their main holidays outside the country* (Pearce, 1992; p. 71)) the tourism sector in Germany is viewed as assuming a minor importance among the other economic sectors (figure 3.2, variable 1).

Despite that, the German tourism organisation is also structured in a three floor hierarchical top-down approach. At federal level the sector is represented close to the government by a sub-commission (German NTA), and there is no ministry charged for tourism affairs. In those matters related to tourism the responsibility falls amongst a number of ministries.

Linked to the German NTA there are two NTOs responsible for tourism at the national level. The (private sector organisation) *Deutsche Zentrale für Tourismus* (DZT), responsible for tourism marketing and promotion. Despite being a private sector organisation the activities developed by the DZT receive strong support from the government. The second NTO is the

(non-profit organisation) *Deutsche Fremdenverkehrsverband* (DFV). The DFV represents the interests of lower order tourism organisations near the federal level. Linked to the federal level there are 11 Länder where tourism is usually run under the umbrella of the Ministry of Economics, or, but not so frequently, under the umbrella of the Ministry of Agriculture and Ministry of Social Welfare (Pearce, 1992, p. 78; Baker, 1990, p. 79).

It is then at the local level that most responsibility is undertaken (Baker, 1990; p. 91). The communes are responsible for carrying out the planning and zoning of the tourism industry; erecting and managing some leisure and tourism facilities; protecting the citizens from business excess; and supporting entrepreneurs. The marketing, promotion, and advertising of tourism is carried out by local *Verkehrsverein* and *Verkehrsamt* or other private sector organisations. Despite that, the activities undertaken by the *Verkehrsverein* and *Verkehrsamt* are strictly coordinated with the local authorities, because the communes are represented on their boards and contribute to their financing. However, the coordination between local tourism organisations and communes has become a problem over recent years since *there is often competition between the local councils and them namely in terms of state subsidies* (Baker, 1990; p. 98). Owing to this the German government is studying the possibility of full privatization of the local tourism organisations in order to avoid such situations (Baker, 1990; p. 99).

(iv) Spain

Despite the fact that the level of federalism in Spain is not so strong as that observed in Germany, a large amount of tourism power has also been moved downwards to the Spanish autonomous regions (*Comunidades Autónomas*) (see Alberta-Piñole, 1993). The Spanish *Comunidades Autónomas* have broad responsibilities in terms of marketing, promotion, planning and development, and are linked upwards to the national government by a ministry of tourism. At the national level tourism is under the umbrella of a ministry of tourism (figure 3.2, variable 2), on account of the importance of the Spanish tourism to the national economy (figure 3.2, variable 1). According to Alberta-Piñole (1993, p. 255) *tourism has been incorporated into the government bodies with a high status even though not achieving the status of a separate ministry. Throughout the years it has been linked to the Ministries of Information, Trade, Transport (and Industry)*. At the local level there are local authorities (*comarcas* and *municipalidades*) with responsibility in terms of planning, development, and control of the tourism development process.

3.3 The development of the market-led approaches since the 1980s in response to the former bureaucratic model

3.3.1 The socio-economic and theoretical circumstances that prompted the emergence of the market-led approaches

As described before the organisational structures implemented in a number of countries up to the 1970s were strongly influenced by Weber's bureaucratic model, by the growth poles theory as well as by the welfare state philosophy. It was also up to the 1970s that some Western and Asian countries experienced rapid industrialization and economic growth (e.g., the G7 countries, i.e. the US, Canada, Japan, Germany, France, the UK, and Italy). The industrialization process of the 1950s and 1960s was linked to the development of large corporations and rapid economic growth. It was then that Weber's hierarchical model, the welfare state philosophy and the growth poles theory found wide acceptance amongst economists and politicians, due to its applicability to the socio-economic environment which had emerged after the two World Wars.

As pointed out by Osborne and Gaebler (1992; p. 15) the models developed up to the 1970s were put forward in *a slower-paced society, when change proceeded at a leisurely gait. (They were) developed in an age of hierarchy, when only those at the top of the pyramid had enough information to make informed decisions. (They were) developed in a society of people who worked with their hands, not their minds. (They were) developed in a time of mass markets, when most (people) had similar wants and needs. And (they were) developed when (there were) strong geographic communities - tightly knit neighbourhoods and towns.*

However, profound changes have occurred since the early 1970s. First, from the usually called 'heavy industries' of the 1950s and 1960s, many investors started to move towards the what is usually labelled as the 'value-added', 'flexible' or, as coined by Toffler (1970 and 1990), 'third wave' industries, such as the high-technology industries (High-Tc) (e.g., superconductors, satellites, computers, information technology, bio-technology, etc) (see, for instance, Schneider and Werle, 1991; Jansen, 1991; Coleman, 1991; Osborne and Gaebler, 1992; Ohmae, 1995; Toffler, 1970 and 1990; Handy, 1994; Rifkin, 1991). In opposition to the former large sized companies, the industry that emerged after the 1970s is characterized by smaller size, more production flexibility, as well as for producing not for large standardized markets but, instead, for smaller and more diversified ones.

Second, whereas the economic expansion of the 1950s and 1960s was linked to industrial development, after the 1970s other sectors not linked to manufacturing (e.g., steel, chemical,

ship construction, textiles, and other 'hardware industries') started to emerge. In particular, the 1970s and 1980s may be identified with what Thirlwall coins as the 'money economy' (Thirlwall, 1989). That is, the development of the 'business of money' arising from wide scale national and international financial operations, linked to services, such as banking, insurance, stock markets and other financial operations, as well as to the development of what Holloway (1989) calls 'the business of tourism'.

As pointed out by Thirlwall the move ahead undertaken in a number of developed countries from 'classic industry' towards tertiary activities may be considered as the third step towards development: *countries are assumed to start as primary producers and then, as the basic necessities of life are met, resources shift into manufacturing or secondary activities. Finally, resources move into service or tertiary activities producing 'commodities' with a high income elasticity of demand* (Thirlwall, 1989; p. 51) (for an expanded analysis see also Rostow's stages of economic growth (Rostow, 1990)).

Third, many of the assumptions underpinning the 'rational' paradigm followed before the 1970s were put under cross fire. Issues linked to 'scientific rationality', 'social equity', 'protection of lower income groups', 'neutrality', 'income distribution', 'unitary public interest', and 'hierarchical equilibrium' were strongly questioned by a number of academics and practitioners, because a rift was noticed between what was advocated in theory and the results achieved in practice (see section 2.4.1) (e.g., Brindley et al, 1989; Boyne, 1993; McDougall, 1990; Simmie, 1979; Osborne and Gaebler, 1992; Hammer and Champy, 1995; Portillo, 1993a, 1993b; Mintzberg, 1983; Vechio, 1988).

Against the former 'rational' paradigm it started to be argued that policies are never 'scientific' and, thus, 'neutral' because, among other things, they are found within limited resources and knowledge, and, hence, solutions depend on available structures, geographic location, level of socio-economic development, political options, etc. That is, policies are set up in accordance with the momentum and the particularity of each place. In addition, the planning and organisational praxis has also proved that some groups are favoured in detriment to others, the reason why the political (and technical) activity is surrounded by lobbies, seeking to influence decisions in their favour.

Fourth, the 1970s were also characterized by what is usually called as the 'revolt of the citizens' against the (bad) quality of a number of services provided by several previously state-owned organisations, in areas such as telecommunications, banking, insurance, transport, housing, power and water supply, planning, etc (see also section 3.4.1). As pointed out by Benveniste (1991), Jaques (1991), Vechio (1988), Mintzberg (1983), Osborne and Gaebler (1992),

Ohmae (1995), the hierarchical model developed by Weber created a 'closed sector career path'. In particular in state-owned organisations *the majority of individuals (...) are part of the permanent hierarchy. They pursue closed career paths within the civil service and respond to a perceived reward system that deters risk-taking. It makes no sense for low- or middle-level bureaucrats to stick their necks out. Their aim is to remain quiet, to follow instructions, to stick to the rules. (...) Low- or middle-level bureaucrats prefer to send risky decisions upstairs* (Benveniste, 1991, p. 152).

Fernando Noriega, director of the Community Redevelopment Agency in Tampa, Florida, goes even further in this criticism and claims that *what (has) happened in the public sector has been a massive attempt to demotivate the employees, by not letting them exercise their minds - by telling them exactly what they have to do and when they have to do it and how they have to do it* (in Osborne and Gaebler, 1992, p. 112). As a result *many persons (in state-owned organisations) pursue a single strategy: do nothing. Doing nothing is relatively safe because it is non-controversial. Only top level management, such as those appointed for political reasons, tend to take risks because they want to make a difference either because it is possible to make a difference (this is exercise of personal power and is most satisfying to the ego), or because their high ambitions in open-career paths require them to be highly visible. (...) Therefore it is usual to observe that there is a great hurry (only among top level managers) to bring about changes and innovations* (Benveniste, 1991; pp.149-152).

Fifth, the 1970s were also characterized by the decade of the development of neo-liberalism. As discussed, it was indeed during the 1970s that capitalism was reinvented in America by the hand of Ronald Reagan (Reaganism), and in Europe by the British Conservatives, headed by Lady Thatcher (Thatcherism) (see section 2.3.1). Since then, profound political and social changes have been operated in society. The role of the state started to be increasingly questioned (see sections 2.2.1 and 2.3.1). With Reaganism and Thatcherism the importance of the state was replaced by the importance of market and individuals. The general assumption supporting neo-liberalism is that because individuals are closer to markets they may better perceive investment and price opportunities, and, therefore, they can bring more efficiency and effectiveness into markets. That is, individuals may better play the role of market 'watchdog' than states because they are closer to them. As pointed out by Boyne, the move operated during the 1970s aimed *to relief 'productive' private sector organisations of the burden of supporting the 'parasitic' public sector* (Boyne, 1993; in section 2.4.1).

3.3.2 The privatization process

One of the main implications of the development of neo-liberalism was the redesign of the role of state in society. Indeed, as a result of neo-liberalism many governments reduced their role in society by either deregulating a number of economic sectors or even by moving some companies, infrastructure and equipment into the hands of private sector organisations (privatization). For instance, chapter 5 illustrates that since the middle 1980s many Portuguese formerly state-owned and -managed companies, such as banking, insurance, cements, oil, telecommunications, transport, etc, have moved into the hands of the private sector. Even in the tourism field it can be foreseen that some companies run at present by government (e.g., *pousadas*) will soon be privatized. Similar privatization processes have also taken place in other countries such as Italy, France, Spain, etc (see for instance, Jenkinson and Mayor, 1994).

It was nevertheless in England that the privatization process, launched by Margaret Thatcher in the early 1980s, assumed greater proportions. As pointed out by Bishop and Hall (1994; p. 1) *one of the most enduring legacies of the 1980s has been the programs of privatization that the Thatcher government set in train in the first half of the decade. Whole sectors of the UK economy which were formerly part of the public sector were sold out to the private sector.* In particular, Green and Vogelsang (1994), Yarrow (1994), Cowan (1994), Price (1994), Ayles (1994), Starkie (1994) and Dogdson (1994) describe how deregulation and/or privatization have changed the way in which British Airways (BA), the production and distribution of electricity, water supply, gas industry, steel production, and the railway network respectively, operate at present in England (for an expanded analysis of the privatization and deregulation process see also Fisher et al, 1988; and Veljanovski, 1988).

Following Beesley and Littlechild (1994), Bishop et al (1994) and Vickers et al (1988) the privatization of public assets, a means which tends to be used for the sale of at least 50% of the shares to private shareholders, is based on the following arguments. First and foremost, privatization is likely to benefit consumers *because privately owned companies have a greater incentive to produce goods in the quantity and quality which consumers prefer* (Beesley and Littlechild, 1994, p. 17). Also, *selling a nationalized industry substitutes market discipline for public influence. That is, resources tend to be used as consumers dictate, rather than according to the wishes of government* (Beesley and Littlechild, 1994, p. 17).

Furthermore, privatization *ensures that prices are consistent with efficient allocation of resources and lowest cost supply* (Bishop et al, 1994, p. 1). Yet, privatization increases the market transparency. As pointed out by Bishop et al (1994, p. 2), *the information conveyed by stock-markets prices has (also) been important in monitoring performance and improving*

managerial incentives. Finally, privatization allows governments to raise extra funds in the process of disposing of assets and, by using this money to cut back debts, they may also reduce taxation and therefore stimulate demand and give the economy a boost.

With regard to the markets shortcomings pointed out in the previous section by Galbraith and others supporters of the welfare state (see section 3.2.5), some ultra liberal sectors have even argued that markets can solve all issues faced by society, including those pointed out by them. They give the example of public or priceless goods, such as water, air, beaches, natural reserves, etc, where if a similar philosophy of that followed in the 'polluter pay' and 'user pay' principles is put forward, a market-led approach can control both the consumption and quality of those assets. Such claims tend to be based on the important developments introduced into the environmental economics field, as documented by a growing literature published on this matter (e.g., Bromley, 1995; Hodge, 1995; Gadgil and Guha, 1995; Dorfman and Dorfman, 1993; Kula, 1994; Barker, 1991; Pearce and Turner, 1990; Fisher, 1981).

Nevertheless, strong controversy remains with regard to this matter. There are also academics who argue that market-led approaches cannot be used in all situations because, and in accordance with the arguments introduced in section 3.2.5, some products are 'priceless', and, therefore, the private sector is unable to control both their consumption and quality. Recent evidence to this is brought by Forsyth et al (1995). In a paper focussing on the specificity of the tourism sector they draw attention to some intangible goods, such as the image of destination areas which, being a price-less 'product', is not taken into account in the operation of private sector organisations. Palmer (1994) points out that the creation of arms-length organisations and Tourism Development Action Programmes (TDAP), such as those that have been set up in England over recent years, may contribute to bringing private and public sector organisations closer in the provision of such price-less goods (an expanded analysis of the potential of the arms length organisations and the TDAPs will be introduced in chapter 5 when discussing the situation of the Portuguese local tourism organisation).

Summing up the advantages brought about by the privatization of several previously state owned companies, and bearing in mind some successful privatization processes achieved in some British companies such as BA and BT, Bishop et al (1994, p. 3) claim that *contrary to what was originally anticipated, privatized utilities have displayed significant improvements in efficiency even when there was little or no competition*. Nevertheless, there is evidence that suggests that the privatization process was responsible for the introduction of an atomistic perspective in the way in which some of these companies are run at present (e.g., water, power supply, telecommunications, etc) (see in particular Marvin, 1994). According to Marvin such a situation may easily be overtaken by the creation of 'utility networks'. That is, the

implementation of utility networks results in bringing to the planning and management of such organisations the global philosophy on which they were based before their privatization. In other words, more strategically oriented policies can be put forward with net benefits for them, for their customers, and for the strategies set up by the local authorities. The alternative organisational model suggested in chapter 4 (networks), aims, among other things, to overcome this type of shortcomings created by the functioning of the market.

3.3.3 Globalization

Another important outcome of the economic development which has emerged since the 1970s has been the globalization of markets. Indeed, since the end of the cold war a number of international relationships have been influenced, and cemented, on international trade and other economic operations. For instance, the socio-economic development and the opening of Portugal to the world over the last fifteen years is strongly tied to the membership of the country to the former EEC, now EU, as well as to the attraction of some transnational corporations, both in the industrial and services sector.

Such a tendency is also observed in other parts round the globe. In particular Ohmae (1995; pp. 1-5) provides a good description of how new variables are nowadays influencing the location of industry and services worldwide. According to him, and in opposition to the industrial and hierarchical developments of the 1950s and 1960s, there is nowadays a growing number of businesses which, first of all, are no longer geographically constrained because they have branches or economic participation all round the world. In addition to that, such organisations are increasingly becoming global in orientation: *the strategies of modern multinational corporations are no longer shaped and conditioned by reasons of state but, rather, by the desire to serve attractive markets wherever they exist and to tap attractive pools of resources wherever they sit. (...) As corporations move, of course, they bring with them working capital. Perhaps more important, they transfer technology and managerial know-how* (Ohmae, 1995; p. 3).

This argument finds support in a recent article published by Spiekermann and Wegener (1994) entitled 'The shrinking continent: new times - space maps of Europe'. These two academics show how space-distance is increasingly becoming out of date. Based on the technological developments introduced over the last decades, and in particular on the improvements brought about by the TGV network (Eurostar), they describe how the emergence of new distances (cost-distance and space-) are bringing a new rationale for the location of economic activities, as well as how they are reshaping the spatial systems and changing the way in which planning theory and practice are nowadays viewed among economists, politicians, and planners.

Finally, the consumers themselves are increasingly becoming global in orientation. *With better access to information about lifestyles around the globe, they are much less likely to want to buy - and much less conditioned by governments injunctions to buy - American, British, French or Japanese products merely because of their national associations. Consumers increasingly want the best and cheapest products, no matter where they come from* (Ohmae, 1995; p. 4). Finally, *the movement of both investment and technology has been greatly facilitated by information technology* (Ohmae, 1995; p. 4).

3.3.4 Advances in information technology

The developments which were produced in information technology over the last decades have also strongly influenced the way in which organisations have evolved since the Industrial Revolution as well as the way consumers react to markets. In particular Beniger (1990), Nass and Mason (1990) and Steinfield and Fulk (1990) describe how the capacity of organisations and individuals to access, store, organize and convey information is determining in the way organisations are established and decision-making and -taking processes are implemented.

By information technology is usually meant 'computer-assisted communication technologies' (e.g., electronic mail, image transmission devices, computer-conferencing, and videoconferencing), and, more sophisticated, and more user-friendly, forms of 'computer-assisted decision-aiding technologies', that are still in the late stages of development or in the early stages of implementation (e.g., expert systems, decision-support systems, on-line management information systems, and external retrieval systems) (Huber, 1990, pp. 237-238; Rifkin, 1991, pp. 240-247).

As pointed out by Beniger (1990, p. 31) *until the industrialization of the nineteenth century formal organisation appeared only when collective activities needed to be coordinated by two or more brains towards explicit and impersonal goals, that is, needed to be 'controlled'*. However, after the Industrial Revolution, and in particular after World War II, new organisational models had to be put forward (e.g., Weber's bureaucratic model) as a result of a rapid industrialization (see sections 3.2.1 and 3.2.2). Beniger (1990, p. 34) claims that *by vastly increasing the speeds of material processing, industrialization created not only the need for modern organisation but also both the need and possibility of control by technology, a factor that - ironically enough - would begin to erode the purpose of organisation itself*.

Ohmae (1995, p. 4) illustrates that *information technology makes possible for a company to operate in various parts of the world without having to build up an entire business system in each of the countries where it has a presence. Engineers at workstations in Osaka can easily control plant operations in newly exciting parts of China like Dalian. Product designers in Oregon can control the activities of a network of factories throughout Asia-Pacific. (...) Armies of experts do not have to be transferred; armies of workers do not have to be trained. Capability can reside in the network and be made available - virtually anywhere - as needed.* In addition to this Rifkin (1991, p. 241) claims that *human civilization (has entered) what may best characterized as the age of simulation.* In face of the present and foreseeable technological advances, society will increasingly be better prepared to predict the future with the aid of powerful machines ('virtual reality').

'Decision aiding' information technology has in particular created the following advantages (Huber, 1990, p. 241): (1) to store and retrieve large amounts of information more quickly and inexpensively; (2) to more rapidly and selectively access information created outside the organisation; (3) to more rapidly and accurately combine and reconfigure information so as to create new information (as in the development of forecasting models or financial analysis); (4) to more compactly store and quickly use the judgment and decision models developed in the minds of experts, or in the mind of the decision maker, and stored as expert systems or decision models; and (5) to more reliably and inexpensively record and retrieve information about the content and nature of organisational transactions.

In opposition to the 'rational', 'scientific' and 'hierarchical' approaches developed after the two World Wars, information technology has also responded to the concerns of those who advocate wider participation in the decision-making and -taking process, more knowledgeable solutions, as well as higher transparency and democracy in the decisions taken by top level managers. In this regard, and according to the discussion introduced in section 2.4.1, Huber (1990, p. 245) claims that *in many organisational decisions, technical and political considerations suggest that the development, evaluation, or selection of alternatives would benefit from exchanges of information among a moderate to large number of experts or partisans. (...) Because computer-assisted communication technologies can greatly reduce the effort required for those individuals who are separated in time or physical proximity to exchange information (...) it is probable that more people would serve as sources of information.*

Bellamy et al (1995, p. 13) also argue that the new information systems *can be used to facilitate the means by which citizens communicate with each other and with their chosen leaders. Communication, dialogue and information exchange are, after all, the cornerstone of an informed body politic.* Successful examples of how information technology has allowed an

easier transmission of political information and opinion between citizens and their public leaders come from Santa Monica, California ('PEN - Public Electronic Network'), Amsterdam ('City Talks' and 'Digital City'), Georgia, USA ('Vision 20/20') (Bellamy et al, 1995, p. 13). An expanded and structured analysis of the potential brought about by information technology to planning systems may be found in Li (1995).

In addition to this Harris (1994, p. 396) claims that the advances introduced in the information technology field, and in particular the development of the GIS (Geographic Information Systems), will have great influence on the way planning will be done in future, due to the GIS capacity to capture, preserve, and present information. According to Harris, the advances introduced in this field will assume great importance, in particular on the following: (1) predicting future amenities and the viability of long-term projects; (2) providing simple input of new features of plans, and rapid outcomes of their consequences; (3) the possibility of sketch planning with altered assumptions of many kinds; such a situation may allow increased levels of public participation; (4) easier, quicker and more accurate simulations; and (5) higher flexibility on the preparation and implementation of the planning decisions.

3.3.5 The growing importance of regional level organisations

Another important variable which has emerged since the 1970s, on account of the increasing competitiveness introduced by privatization into markets, market globalization and the advances in information technology, is what Ohmae (1995) calls the emergence of 'region-states' (although based on a different development scale this concept has several similarities with the term 'regiopolis' used by Gradus and Stern (1980)). The terminology of 'region-states' is used in the literature with the aim of opposing the new organisational frameworks which flourished at the end of this century with the prominence of the 'nation-states' developed after the Industrial Revolution.

As discussed before, the Industrial Revolution was responsible for attracting an unprecedented number of people to towns (see section 2.2.1). As described by Durkheim, society moved then from a 'mechanic' or 'ad-hoc' organisation, dependent on a short range of relationships, such as family and neighbourhood ties, to an 'organic society' where relationships started to be cemented on professional (work) interaction (section 3.2.1). Weber's hierarchical model, based on the prominence of the state, was then viewed as *essential for ordering complex societies* (King, 1986; pp. 70-71) (section 3.2.2). Indeed, the hierarchical organisation developed by Weber allowed governments to bring all parts of the country together and, therefore, contributed to the development of the sense of the 'unified' or 'homogeneous' state.

However, the new organisational structures developed after the 1970s have challenged the supremacy of the nation states. Nowadays some regions tend to create privileged relationships with other foreign regions in detriment to the regions located within their own country. Ohmae (1995) illustrates how steady transnational relationships are looming between regions such as San Diego and Tijuana; Singapore and some parts of Malaysia; Silicon Valley and the Bay Area; Hong Kong and the adjacent portion of the Chinese mainland.

Examples of 'new regions in a borderless Europe' may also be found in an edited book published by Cappellin and Batey (1993), focussing on several cases of newly European 'regional networks'. For instance, Funck and Kowalski (1993) describe the transnational network created in the Upper Rhine Region, encompassing the German-speaking region of Basel, the French region of Alsace, and parts of the German states of Baden-Württemberg and Rhineland-Palatinate. Van der Veen (1993) illustrates how a new transnational region, called EUREGIO, embracing 106 municipalities and 1.9 million inhabitants was set up between the Dutch and German borders. The EUREGIO organisation already has a council and parliamentary assembly. Figueiredo (1993) speaks about an economic upsurge and strengthening of administrative relationships between Northern Portugal and the Spanish autonomous region of Galicia. Other examples of transnational cooperation and borderless organisations involving other European regions may also be found in Pimpão (1993), Guesnier (1993), Quévit and Bodson (1993), Steiner and Sturn (1993), Horváth (1993), and Vickerman (1993).

Yet, cases of how international business networks are sublimating the prominence of nation states and bringing a new dynamics into the world may also be found in three books published by Jarillo (1993), Marin and Mayntz (1991), and Knoke (1990). Marin's and Mayntz's edited volume make particular reference to the emergence of international business networks in the telecommunications domain (Schneider and Werle, 1991), in the case of the High-Tc superconductors (Jansen, 1991), in central banks (Coleman, 1991), in the labour field (Pappi and Knoke, 1991), and in health policy (Döler, 1991).

The questioning of the rational paradigm, the dynamics brought about by the privatization of a number of companies, the advances introduced in information technology, the globalization of markets and in particular the mushrooming of 'region-states' and 'borderless organisations' worldwide, have decisively contributed towards a shift in terms of regional development theories. In opposition to the development paradigm from 'above', the centre-down-and-outward paradigm discussed in the previous section (Hansen, 1981), the origin of which is linked to the neoclassical theories, it has started to increasingly be argued since the 1970s that

development should (at least complementary) be seen from 'below'. Stöhr (1981, p. 40) sees this as *a clear departure from the primarily economic concept held in the 1950s and 1960s with its ensuring pressure on individuals, social groups, and territorially organized communities to develop only a narrow segment of their own capabilities and self-determined objective in order to retain a competitive position in economic and political terms 'vis-à-vis' the rest of the world.*

At first sight it might be thought that the main difference between the 'above' and 'below' paradigms falls on the location of decision-centres. That is, while in the 'above' paradigm the decision-centre is placed on the top of hierarchic and centralized organisations (Weber's hierarchical model), in the 'below' paradigm decision-centres are moved downwards in the organisations, close to the places where problems emerge (see also section 2.4.1 where the issue of 'localism' is discussed). Although embracing that objective the assumptions underpinning the down-top paradigm imply many other things.

In particular *development from below implies, specific forms of social and economic organisation (emphasizing territorial rather than mainly functional organisation), and a change in the basic concept of development (going from the present monolithic concept defined by economic criteria, competitive behaviour, external motivation, and large-scale redistributive mechanism to diversified concepts defined by broader social goals, by collaborative behaviour and by endogenous motivation)* (Stöhr, 1981, p. 39). In other words, the basic objective of development from below is the full development of a region's natural resources and human skills ('generative growth') (see Richardson, 1973). This is what is examined in the following section.

3.3.6 The development of horizontal organisations

It is argued by a number of academics working on the organisational theory field (e.g., Vechio, 1988; Mintzberg, 1983; Laumann and Knoke, 1987; Knoke, 1990) that new ways of thinking and structuring organisations must be put forward in order to face the developments introduced in the world over the last quarter of century (e.g., privatization, higher competitiveness, globalization of markets, information technology, emergence of 'region-states', development from 'below', etc). In particular Vechio (1988, p. 452) and Mitzenberg (1988) argue that Weber's bureaucratic model is no longer adjusted to reality, on account of the following reasons.

To begin with, the model is too conservative and inflexible since it was set up to answer the problems of the society that emerged after the two World Wars (Vechio, 1988, p. 452). As also

pointed out by Osborne and Gaebler (1992, p. 15) the bureaucratic model was developed *for a slower-paced society*, and, thus, has proved to be inadequate for the modern and flexible society.

In second place, reliance on rules and the maintenance of impersonal attitudes leads to the inability to cope with unique cases that do not 'fit the mould' and for which the rule book does not dictate a solution (Vechio, 1988, p. 452). This situation assumes particular relevance nowadays when there are a number of organisations where decisions must be taken rapidly and, thus, cannot rely on rigid bureaucratic structures (e.g., banking, insurance, stock markets, high-tech industry, etc).

In third place, impersonality can lead to feelings of frustration for people who must work in or with a bureaucracy due to the system's lack of 'soft side' or 'human face'. According to Beetham (1991, p. 133), Vechio (1988, pp. 452-453) and Mintzberg (1981, pp. 36-37) hierarchy is also responsible for producing 'excessive red tape', and excessive repetitive and formalized horizontal tasks that lead to the creation of psychological, as well as physiological, problems for many workers. Such an approach is nowadays out of date principally when growing numbers of employees, and in particular specialized personnel, show a strong willingness to have a say in decisions that directly or indirectly influence their career and life.

In this respect the supporters of hierarchies tend to argue that *value-adding managerial leadership of subordinates can come only from an individual one category higher in cognitive capacity, working one category higher in problem complexity* (Jaques, 1991, p. 115). However, they also tend to forget that *bureaucratic authority derives from the occupation of a position or office within a hierarchical structure, and from the powers that reside in the office* (Beetham, 1991, p. 134).

What nowadays one must realize instead is that knowledge is no longer restricted to a handful of people but is becoming spread in society. Therefore, organisations must start to deal with the role of expertise. This new source of power *resides in the individual as 'an authority', not in the position he or she occupies*. As also pointed out by Beetham *most administrators are (nowadays) involved in supervising people with expertise which they do not themselves possess: financial, technical or professional* (Beetham, 1991, p. 134; see also Jaques, 1991, p. 115). For these new emerging subordinate experts there can be a considerable conflict between obedience to the instructions of a superior or the rules of the organisation, and obedience to the requirements or principles of their profession. In addition to this, when specialized personnel is faced with the traditional hierarchical philosophy based on routine tasks, *feelings of 'alienation'*

or 'estrangement' may be developed, and the related lack of challenge and novelty can lead to dissatisfaction and turnover (Vechio, 1988, p. 452).

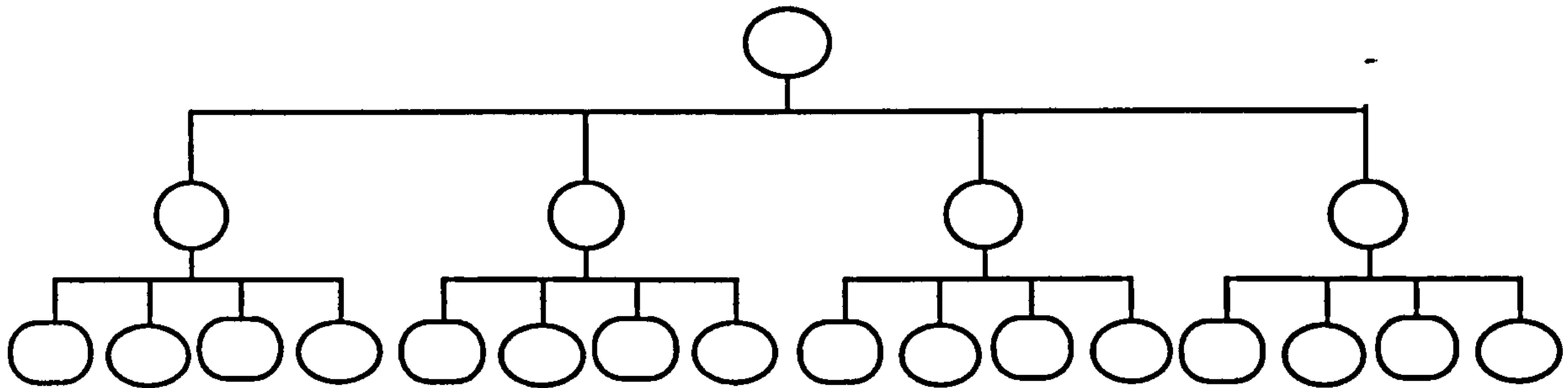
The advantage of bringing managers and employees closer in the decision-making and -taking process is usually presented in literature linked to the potential that empowered employees may represent to modern society (see, for instance, Osborne and Gaebler, 1993; Sweeting, 1995; Handy, 1994). Despite the growing amount of literature pointing out the potential contained in such approaches, there is also evidence that in a number of situations top level managers may not be willing to follow that direction. As illustrated by Ezzamel et al (1994, in Sweeting, 1995) what a number of managers tend to do is, instead, resist such trends, by using some technological advances (e.g. computer information systems) to increase the level of detailed tracking of individual workers (for an expanded analysis see Ezzamel et al, 1994; Sweeting, 1995).

In fourth place, *organisations which are experiencing a high rate of environmental change need to be more free flowing and flexible. A bureaucracy would be too slow moving for organisations that need to adapt frequently or quickly to meet constant changes* (Vechio, 1988, p. 453). In addition to this, it is claimed in literature that people who deal with uncertainty increase their performance, productivity and bring more informed solutions into the decision-making and -taking process (Mintzberg, 1981, p. 37). Hence, it is argued that instead of working in closed-career paths workers must be given a higher sense of autonomy as well as exposing them to risk situations (open-career paths). The exposure of workers to the eyes of the community is also viewed by Benveniste (1991, p. 145) as an effective way of improving their performance because, soon or later, they will understand that the evolution of their career depends on their talent as well as on their capacity to bring new approaches and solutions to the problems with which they deal with.

It is then in opposition to the former hierarchical and inflexible top-down principles and also aiming at bringing employees and managers closer in the decision-making and -taking process, that most of the proposals for the new organisational structures are looking. Among the solutions introduced in literature two main principles deserve special attention.

The first one is linked to what Vechio calls the 'flat structures', schematically represented in figure 3.3. According to Vechio (1988, pp. 445-449) the adoption of 'flat structures', in opposition to bureaucratic ones (see figure 3.1), is likely to bring about the following main benefits. To start with, the span of control, which dictates the stature of an organisation, becomes smaller, because there is a larger number of employees reporting to the same supervisor. Then, flat organisations imply that there is a larger number of employees working

Figure 3.3 - Example of an hypothetical horizontal organisation
(flat structure)



Source: adapted from Vechio (1988, p. 446)

together. This implies, among other things, that there is less specialization, less routine, more group based work, greater exchange of information among employees as well as a greater use of the employees' skills in multiple tasks. In short, decisions taken within an organisation may potentially be enriched since they are not taken on the basis of one 'head' but, instead, several 'heads'. Furthermore, flat structures lead to better sales, profitability, and employee job satisfaction than tall organisations. Following Vechio, the precise mechanism by which such gains can be achieved is not yet clearly understood. However, it is likely that flatter structures possess greater decentralization, and decentralization serves as the driving force for improving employee performance and attitudes (for an expanded analysis see Vechio, 1988, pp. 445-449).

The second principle, which is tied to the premise supporting the operating philosophy of flat organisations, is linked to what Osborne and Gaebler (1992) call the 'mission-driven' organisations. Mission-driven organisations are organisations that *turn their employees free to pursue the organisation's mission with the most effective methods they can find* (p. 113). The empirical evidence collected by Osborne and Gaebler allow them to conclude that, compared to the bureaucratic or 'rule-driven' organisations, mission-driven organisations offer the following main advantages (Osborne and Gaebler, 1992, pp. 113-114). First and foremost, they are more efficient than rule-driven organisations. Empirical evidence illustrates that mission-driven organisations are able to accomplish the same tasks with fewer employees. Yet, they are more effective, namely because they produce better results. Also, they are more innovative than rule-driven organisations, because new managerial and technological techniques may more quickly be brought into the organisation without having to follow rigid, bureaucratic and demotivating procedures (see section 3.3.5). Next, they are more flexible than rule-driven organisations because they are more decentralized and less bureaucratic. Finally, they have higher morale

because employees receive stimulus to actively participate in the organisation's achievements and failures.

3.3.7 The changes operated in the planning systems

Most of the discussion introduced in the above sections has also had a strong impact on the way in which the planning activity has been questioned over the last 15 years. For instance it is increasingly argued among planners that the rational planning approaches of the 1950s and 1960s were based excessively on top-down approaches that failed to take into account their surrounding environment (see sections 2.2.1 and 2.3.1). Healey (1990, p. 10) claims that the rational planning of the 1950s and 1960s *failed to address the diversity of interests and values which increasingly sought to get leverage on politicians and public policy programs (...)* because *consultation with other interested parties was tolerated as part of the acquisition of knowledge, but within the framework established by political values (...)* and also because it was believed that *planning (could) be done for people rather than with people.*

However, due to the developments introduced since the 1970s (e.g., globalization, emergence of region-states and borderless organisations, advances in information technology, privatization, neoliberal movements, the development of services and flexible industries, the revolt of the citizens, the upwards paradigm linked to the questioning of the rational paradigm and the centre down philosophy) most of the top-down hierarchical approaches have become out of date. It is claimed by a number of politicians, economists, sociologists, and planners that a profound restructuring must be introduced into the inflexible bureaucratic structures that, despite their inadequacy, rule at present the vast majority of the organisations.

In opposition to the former top-down paradigm most of the new planning and organisational theories advocate the idea that the success of an organisation, and of the planning activity as well, does not depend only on their internal performance ('structural dimension') but also on the way they perceive, communicate and interlock with the surrounding environment ('contextual dimension') (see for instance Vechio, 1988, p. 457). It is then based on that principle that a number of new organisational and planning theories have been put forward. The concept of network which is described in the following chapter (chapter 4) shows very close links with these notions of 'structural dimension'.

Most of the new theories, focussing on the contextual dimension in which organisations should operate in future, are linked to a number of new concepts, or 'buzz words' as some more skeptical sectors prefer to name them, brought to the field by a growing number of academics

and practitioners interested in these matters. Among them one may find the following: 'intermediation' (Forester, 1989); 'lateral thinking' (Roberts, 1974); 'planning through debate' (Healey, 1990); 'partisan mutual adjustment' (Lindblom, 1965 in Healey 1990); 'popular planning' (Darke, 1990a, 1990b); 'empowerment' (Osborne and Gaebler, 1992; Sweeting, 1995); 'diversity and convergence' (Healey and Williams, 1993); 'partnership' (Bennet and Krebs, 1991); 'borderless organisations' (Ohmae, 1995; Jarillo, 1993); 'flat organisations' (Vechio, 1988); 'regions-state' and 'regiopolis' (Ohmae, 1995; Gradus and Stern, 1980); 'reeengineering organisations' (Hammer Champy, 1993); 'entrepreneurial government' and 'entrepreneurial planning' (Osborne and Gaebler, 1992; Stoker and Young, 1993).

It is undeniable that the developments introduced after the 1970s and some of the (new) above concepts have strongly influenced the way in which a number of organisations, literature and political theory and practice has changed over the recent past and are likely to continue changing in future.

In particular such a situation is well documented by recent literature direct or indirectly focussing on the new role that citizens should assume within political, economic, and social theory and practice. For instance, it is argued in a growing amount of literature that there is an urgent need to bring citizens into the core of the decision-making and -taking process for the reasons introduced before (section 2.4). That is, citizens are closer to the problems and, thus, are better placed to evaluate the efficiency of the policies proposed by decision-makers; they might make valuable contributions and, thus, enrich the final solutions; citizens can work as 'watchdogs' of the decision-making and taking process; decisions become more democratic and transparent; and participation helps to bridge the gap between theory and practice).

The importance of giving increased importance to public participation (or 'popular planning' as coined by Darke (1990a, 1990b)) is well documented in a growing amount of literature published by some academics with interest in the tourism and town planning matters, such as Pearce and Butler (1993), Murphy (1985), Doxey (1975), Haywood (1986), Fagence (1977), Falk and Brodie (1975), Blank (1989), Forester (1989), and Friedmann (1987) (see also section 2.4).

In addition to the issue of public participation it is also nowadays noticed that there is a swing away in literature from the assumptions underpinning the rational approaches of the 1950s and 1960s, namely in terms of defending the idea that because markets and planning processes are different sorts of enterprise they should be viewed into independent spheres. In opposition to that, there is a growing amount of literature which, by defending the idea that the planning activity and the surrounding natural, social, economic and political environment are part of the

same enterprise (e.g., Hawkins, 1993; Choy, 1991; Gunn, 1988; Pearce, and Butler, 1993; Mill and Morrison, 1985), look for approaches able to bring together private and public sector organisations under strategic alliances involving private and public sector organisations. The 'partnership schemes' are amongst the most often cited alliances referred in literature (e.g., Quince, 1990; SQW, 1988; Wade, 1990; Bennet and Krebs, 1991).

Yet, examples of the potential offered by regional level organisations in terms of promoting a stronger interlocking and 'lateral thinking' among the regional actors; working as a qualified platform for the development of strategies taking into account the specificity of each place and the regions sustaining capacity; and promoting a closer coordination of the actors and organisations that direct or indirectly are linked to the development process, are also available in a growing amount of literature. In the tourism field some theoretical illustrations and good practice description may be found in WTO (1983, 1985a, 1985b), RTPI (1992), Inskeep (1994, 1992), Gunn (1994), and Curry and Morvaridi (1992).

3.3.8 Organisations in the middle 1990s - new principles underpinned by old structures?

Despite all these changes described before, it is nevertheless to be found that most organisations, and in particular public sector organisations, are still operating within the same organisational framework set up after the Industrial Revolution. In other words, most institutions are still operating within the bureaucratic top-down structure inspired on Adam Smith's and Weber's specialization and task division. The case of Portuguese regional tourism administration is good example of that, as will be seen in chapter 7.

In particular Osborne and Gaebler (1992; pp. 15-16) claim that bureaucratic institutions may even nowadays work in some circumstances, such as when the environment is stable, when the task is relatively simple, and when every customer wants the same service. According to them, this is the case of some repetitive services run, for instance, in some social security units, in local government agencies that provide libraries and parks and recreational facilities, etc. However, such approaches are becoming inadequate in growing numbers of situations for the reasons discussed before. As pointed out by Osborne and Gaebler, nowadays *we live in an era of breathtaking change. We live in a global marketplace, which puts enormous competitive pressure on our economic institutions. We live in an information society, in which people get access to information almost as fast as their leaders do. We live in a knowledge-based economy, in which educated workers bridle at commands and demand autonomy. We live in an*

age of niche markets, in which customer have become accustomed to high quality and extensive choice (Osborne and Gaebler, 1992; p. 15).

Some academics in the tourism field have also criticized the lack of organisational structures capable of putting forward the changes operated in society over the last quarter of century. For instance, commenting on the way in which the English tourism planning system changed during the 1980s, Cooper (1987) notices that there has been indeed a *reworking of the spatial organisation of tourism responsibilities*. According to him this is due to the fact that many of the national responsibilities conferred by the 1969 Tourism Development Act to the ETB and BTA have been transferred to the 11 English RTBs, as a result of their proximity to the development process (see section 2.4.2).

Medlik (1989) also does not deny that tourism boards may indeed play an important role by coordinating, supervising, and stimulating the regional development process. What he nevertheless criticizes is the fact that governments tend to give regions a number of responsibilities without creating efficient and effective agencies (see also Stoker and Young, 1993, p.9).

Evidence that the English tourism planning system is moving in the direction of the developments introduced over the last quarter of century but lacks organisational structures to effectively take it forward is also observed from the PPG 21 (Tourism Planning and Policy Guidance). Indeed, and as discussed in section 2.4.2, it is undeniable that the PPG 21 contains some of the seeds of future tourism planning activity. In particular, it is recommended in the PPG 21 that tourism planning is to be put forward with deference to markets ('market-led approach') instead of only being based on ideology. It is also argued that planning approaches must be designed to be linked to the surrounding natural, social and economic environment. Yet, it is advocated that regional strategies must become more strategic than normative, and also that tourism strategies must include public participation. (for an expanded analysis see section 2.4.2)

However, the PPG 21 is not followed by a complementary document explaining, among other things, how the balance between planners and general public is to be achieved; how the general public is to be brought into the planning process; where normative and strategic planning start and end; and, above all, how such improvements can be achieved within the present organisational framework. In other words, if the PPG 21 is to be put forward without any restructuring of the present organisations things will not change that much, since what will happen is the transfer of more responsibilities to the existing organisations, instead of creating new ones capable of effectively tackling the problems.

Evidence that governments and professionals tend to look for alternative solutions to new problems within the old top-down framework is not exclusive to tourism and to England. Indeed, other examples all round the world and in other fields may yet be cited.

For instance, despite the fact of it being recommended by the EU that governments should give more powers to regional and local organisations with the aim of bringing citizens closer to decisions, reduce bureaucracy and waste of resources, speed-up the development process, and provide a more sensitive (and rational) planning and management of resources ('subsidiary principle'), it is, nevertheless, known that in a number of situations the development of the EU has mostly implied the introduction of another tier of government in the EU countries. Such a situation has given ammunition to a number of Euro-skepticals who claim, in opposition to what is argued by the Euro-supporters, that a federal Europe brings more bureaucracy, waste of resources, and takes decisions away from local government and citizens.

For instance, it is observed from figure 2.16 that with the development of the EU the British regional planning process changed mostly in the way in which another tier of government was added to the previous planning system. That is, the chart illustrates that with its involvement in the EU the British regional and local planning system became not only answerable to the British government but also to Brussels. In other words, instead of stimulating a restructuring of the European planning systems the practical effects of the EU planning legislation to England, a criticism which may be extended to Portugal and to other EU members states, have been the introduction of another tier of government in the administration.

In this respect the effect of the EU on Portugal has been even worse. It will be seen later that the Portuguese tourism organisation is strongly centralized in the national government, whereas most of the RTBs operate under low levels of efficiency and effectiveness. Most funding provided by the EU to Portugal is channelled to the national government, and most tourism boards do not even have a say in decisions relating to their regions. In short, the European globalization has meant to Portugal the introduction of another tier of government in the present organisation, enlarging the powers of the already powerful national government in detriment to the regions (see, for instance, sections 5.3.2.5 and 5.3.2.7).

To conclude, despite the important developments introduced worldwide over the last quarter of century, which demand a profound rethinking of the way in which organisations operate, it is nevertheless observed that a number of public sector organisations are still operating within the organisational framework set up for the society which emerged after the Industrial Revolution. That is, despite the higher flexibility introduced into society by the increasing world

globalization, the shift towards services, the technological advances brought about by new information technologies, the dynamics introduced into markets by neo-liberalism and, generally speaking, by market-led approaches, public sector organisations are still operating within the bureaucratic top-down structures inspired on Adam Smith's and Weber's division of labour.

3.4 Conclusion

It was viewed in this chapter that the hierarchical model created by Max Weber offered the society which emerged after the Industrial Revolution, and in particular the economic expansion launched after World War II, the right framework for ordering and coordinating vast numbers of people. The 1950s and 1960s were characterized by the golden years of manufacturing. Development was then linked to large scale operations, large size corporations, multinationals, creation of new firms, massive production, standardization of products, and low unit costs. To these demands hierarchies brought the advantage of allowing high-task specialization, informal coordination, control, discipline and cost reduction.

However, since the early 1980s profound changes have been introduced into the world. On account of the major oil crisis of the early 1970s, world economic slow-down, instability on the financial markets, and the dollar devaluation, the world entered a new economic cycle. Fueled by the development of neo-liberalism, world globalization, the advances in information technology, the growth of services and high-tech industry, etc, the world economy has shifted from large scale operations, economic expansion and quantitative developments, towards small size operations, full utilization of resources, and investment in quality. With the improvement of the education standards, the success of organisations has also become dependent not only on a small group of core bureaucrats but, instead, on the skills of growing numbers of specialized staff.

Owing to these circumstances the former large scale corporations are giving place to smaller, more creative and also more specialized organisations. In addition to this, growing numbers of new organisations are flourishing everywhere, on account of the up-grading of the educational standards of the individual, and on growing sensitivity to matters linked to the environment, new technologies, culture, preservation of traditional life styles, rural protection, defence of minorities, and so forth. Such independent groups have achieved growing importance in the new world order, since they are responsible for collecting large amounts of data, for holding important information and skills about specific phenomena, and developing a greater involvement in the decision-making and -taking process.

It is then with this new approach that planners must start to deal. The time for planned solutions based on a narrow range of participants is disappearing. In future, successful planning attitudes will arise from the planners' capacity to capture the knowledge and the demands of all these multiple, and often conflicting, interest groups. Monolithic organisational structures based on inflexible attitudes, hierarchical dominance and arrogance have, therefore, been discarded from the planners' agenda. Conversely, planning is moving towards inclusive, creative, comprehensive, participatory, informed, horizontal, and democratic attitudes (section 2.4.2).

However, and in order to implement these new approaches, new forms of organisation are required. The aim of the following chapter is to provide an expanded discussion of alternative organisational structures that might contain the strengths of the hierarchies, developed in the post-Industrial Revolution period, and the new variables that have arisen on account of neo-liberalism. As will be shown several alternative types of organisations may already be observed in several places (e.g., partnerships, arms-length organisations, development corporations, etc). Their structure, philosophy, and operating philosophy is linked to the network theory that is discussed in the next chapter.

Chapter 4

Organisational structures - Networks (an alternative way forward?)

4.1 Introduction

It was argued in the previous chapter that the society which emerged after the Industrial Revolution demanded rigorous forms of discipline, rationality and organisation. Hierarchies were then seen as having great potential to fulfill these demands. However, it was also seen that neo-liberalism has introduced profound changes into society. In opposition to the large size developments of the 1950s and 1960s, nowadays society is driven by small size industry, services, transnational corporations, information technology, etc. In the face of these new variables the hierarchical model set up by Max Weber has shown several weaknesses, and, therefore, alternative organisational structures more adjusted to today's reality have been proposed in literature.

Some of the most widely known alternative models which have been suggested in the literature include partnership schemes, arms-length organisations, development corporations, and other formal or informal arrangements that involve, simultaneously, private sector operators, public sector institutions, non-profit agencies and other independent groups. To a greater or lesser extent most of these new organisational frameworks are based on the network theory.

The aim of this chapter is to discuss the potential that networks may bring to today's society. Taking into account the present move towards flexibility, networks are introduced as structures which may be placed between the (rigid) hierarchies, that dominated the post-war period, and the 'absence' of inter-organisational commitments, as suggested by neo-liberals. Not denying

either the importance of competitiveness (brought about by markets) or the need for organisation and rationality in the way in which organisations interact with each other (brought about by hierarchies), networks are presented as containing part of the potential of both approaches.

This chapter provides discussion of networks, their potential and actuality. The theory and origin of network analysis theory is also discussed with the objective of showing that, despite their 'novelty', the idea of network is rooted in principles whose origin may be traced back to the middle of this century. After analysing that, the discussion moves towards an expanded evaluation of the potential, applicability, and actuality of the network theory to the problems faced nowadays by growing numbers of organisations.

What will in particular be seen is the fact that networks offer room enough to accommodate, under the same umbrella, a wide range of organisations (e.g., public, private, non-profit, independent groups, etc). In addition, it is also shown that networks offer great potential to planning activity, since some of the most important problems which are faced nowadays by planners can be addressed, such as how to find an administrative structure capable of sustaining the increasing pressure for more pragmatic approaches; more comprehensive and inclusive planning attitudes; stronger levels of public participation; and better informed solutions.

4.2 Importance and origin of the network analysis

As pointed out in the previous chapter, the socio-economic changes which have occurred in the world during the recent past (e.g. neoliberalism, world globalization, information technology systems, the reworking of spatial systems, the development of more flexible economic activities, the inadequacy of the bureaucratic model, the questioning of the assumptions underpinning the welfare state of the 1950s and 1960s, as well as the planning and organisational theories linked to this period) have boosted research in the organisational field looking for alternative ways of putting forward the planning and organisational systems.

An area which is pointed out in the literature as offering an alternative framework to adjusting organisations to the challenges brought about by the events developed after the 1980s, is that of networks. According to Li (1995), Ohmae (1995), Jarillo (1993) Osborne and Gaebler (1993), and Lincoln et al (1992), networks, or network based structures, will become in future one of the most important organisational frameworks. To Cook and Morgan (1993) networks will acquire a new dominance in the field of industrial organisation. In their view this new paradigm seems to be flourishing on the basis of the shortcomings associated with markets and vertical

hierarchies, primarily because of changing technologies, demands, products, etc. To Dicken and Thrift (1992) networks are organisational frameworks that will tend to mushroom as organisations start thinking globally, as they look for more flexibility, as well they as increasingly become linked and dependent on the surrounding environment.

Accordingly, Clarke (1994, p. 637) argues that the changes operated in a number of economic activities since the mid-1970s point *towards more flexible systems of production delivering more diversified consumer products addressed to 'niche markets'; more flexible - or 'multi-skilled' - workers, and more globally mobile patterns of capital investment. Such trends mark out the claimed shift towards post-Fordism.* In addition to this, and looking in particular for alternative ways of making the present planning system more realistic, Harris (1994, p. 393) also argues that new styles of planning must be found by *initiating a multiplicity of mutually supporting changes, on facilitating movement in new directions, and on creating an environment (or parts of one) which will enhance the development of innovative thinking and action by planners themselves.*

A key issue which emerged from the discussion introduced in the previous chapter is that organisations may no longer be seen in an isolated way, since their success tends to increasingly become linked to the surrounding environment (Fahey, 1994; Christopher, 1994; Ohmae, 1995; Jarillo, 1993). Although difficult to define, by surrounding environment is, nevertheless, meant those conditions external to an organisation, which, direct or indirectly, influence its production, efficiency, effectiveness and behaviour (see Fahey, 1994; Christopher, 1994; Ohmae, 1995; Jarillo, 1993; Nightingale and Toulouse, 1977).

The importance of the relationships established between an organisation and its environment is well documented by Tjosvold (1986, p. 517). According to him the organisational environment is crucial to the success of an organisation because *interdependence pervades organisations and is fundamental to understanding them. Individuals within a group, work groups within departments, and departments within organisations all depend upon each other. Even persons who work independently at their own job typically require others to provide information and supplies to complete their work.* Tjosvold also argues that the links which are established between an organisation and its environment are so important that some *theorists have proposed that interdependence and subsequent interaction among individuals and groups are the bases of organisations.*

Also focussing on this matter Morgan (1988, in Knoke, 1991, p. 94) claims that *the idea of a discrete organisation with identifiable boundaries (...) is breaking down.* According to him, *organisations are becoming more amorphous networks of interdependent organisations where*

no element is in firm control. Even though such a network may have a focal organisation (...) the focal organisation is as dependent as the organisations in the network. Interdependence is the key. Gone is the old-fashioned notion of hierarchy in which one member (for example, the focal organisation) directs the activities of other members. In comes the notion of a network that must be managed as a system of interdependent stakeholders.

Knoke (1990, p. 95) also points out that *this concept of network interdependence is applicable to intra- as well as to inter-organisational analyses. (...) Within such protean systems, power increasingly derives from the capacity to manage relationships rather than to manage persons.* This point of view may also be found in literature published by other academics, such as Ohmae, 1995; Hammer and Champy, 1995; Handy, 1994; Osborne and Gaebler, 1992; Jarillo, 1993; Cook and Morgan, 1993; Vechio, 1988; and Mintzberg, 1983.

Despite the fact that most of the insights into the relationship between networks and business activities date from the late 1980s and early 1990s, the concept and theory of network are not so recent as apparently it might be thought (see also section 6.4). On the contrary, the roots of the network theory and practice may be traced back to the research conducted in the late 1950s and 1960s on 'social behaviour as exchange' (e.g., Homans, 1958; 1974), 'social psychology of groups' (e.g., Thibaut and Kelly, 1959), 'exchange and power' (e.g., Blau, 1964), 'operational research in local government' (e.g., Ward, 1964), and 'interorganisational and exchange analysis' (e.g., Miller, 1958; Levine and White, 1961; Reid, 1964) (for an expanded analysis of the historical roots of the network theory see in particular Jarillo, 1993, p. 127; Knoke, 1990, pp. 14-15; Zeitz, 1980, p. 72; Provan et al, 1980, p. 200; Benson, 1977, pp. 1-2; Benson, 1978, pp. 69-70; Emerson; 1976, p. 335; Stringer, 1967, pp. 105-106; Hall et al, 1977, pp. 457-460; Marret, 1971, pp. 83-85; Thomas, 1957, pp. 347-348).

In particular the articles published by Levine and White (1961), Litwak and Hylton (1961/62), Hall et al (1978), and Provan et al (1980) illustrate remarkably the type of approach followed by most academics in the early days of the network analysis theory. As shown in these articles, in its early stages most research was directed to small and easily identifiable networks of friends, human delivery services, universities, health-care centres, labour-management relations, intergovernmental problems, educational consortia, and other non-profit making institutions and issues (for an expanded analysis see chapter 6). Another main characteristic of the insights provided into the network analysis in the early stages of its development is linked to the fact that most of it was carried out by sociologists with few interest in business matters (Jarillo, 1993, p. 127; Marret, 1971, p. 83).

However, since the middle 1980s the network analysis theory has started attracting the attention of growing numbers of economists, planners, sociologists, geographers, psychologists and politicians. Since then larger numbers of academics and practitioners have become sensitive to the importance of the intra- and inter-organisational environmental design to the organisations' profitability, efficiency and effectiveness as well as to the employees' motivation (and thus to their productivity). It is also since then that literature has started to be published in this field, as will be seen by the references cited in the following sections.

4.3 The concept of network

Most definitions focussing on the 'network' concept define it linked to two other notions: the ideas of 'exchange' and 'power'. Firstly, the network concept will be explored and then it will be seen how the 'exchange' and the 'power' concepts are associated with it. At the end of this section there will be an attempt to provide a comprehensive definition of the network concept, by linking it to the exchange and power notions.

Literature focussing on network analysis offer a number of definitions of the network concept. However, and as pointed out by Jarillo (1988, p. 31), many of them emerge ill-defined when translated into the business or business related field since, as discussed in the previous section, most of the research pioneering this area was initially conducted by sociologists whose interest was different to the perspective nowadays given by economists and other researchers interested in economic or economic related matters.

Some useful definitions are, nevertheless, offered, among others, by Thorelli, Lorenz, Johnston and Lawrence, Benson and Jarillo. For instance, Thorelli (1986, p. 38) defines networks as organisational structures whose philosophy may be placed between markets and hierarchies (for an expanded analysis see chapter 3). According to him, *the term network refers to two or more organisations involved in long-term relationships*. In addition to this he also argues that *the entire economy may be viewed as a network of organisations with a vast hierarchy of subordinate, criss-crossing networks*.

Lorenz (1991), in a study describing how the Italian textile industry became highly competitive and successful by adopting an organisational structure based on the networking philosophy, gives the following clues to explain his concept of network. First, networks are about medium- and long-term relationships. Second, they do not conform to the economist's competitive ideal; they involve mutual dependency, because each firm's actions influence the other; hence, they involve situations in which interorganisational cooperation becomes a need. Third, they may

not necessarily include comprehensive planning and/or other forms of formal planning and commitment; instead, they might be loose. Finally, they must necessarily include some kind of 'trusting behaviour' among their partners.

Johnston and Lawrence (1991, pp. 193 and 195), by proposing that networks are 'value-adding-partnerships', define a network as *a set of independent companies that work closely together to manage the flow of goods and services along the entire value-added chain* (p. 193) (...) *in which each player (...) has a stake in the other's success* (p.195). According to them in a network ties must be set up *not only vertically, with suppliers, but also horizontally, with what would usually be considered direct competitors* (p. 197). This definition is similar to Benson's (1982, p. 148): a network is *a complex of organisations connected to each other by resources dependencies and distinguished from other (...) complexes by breaks in the structure of resource dependencies*.

Jarillo (1993) defines a network as *a set of companies that work together towards a common goal* (p. xi), in which coordination is not achieved by mergers and acquisitions, but through the creation of a 'strategic network' of companies, working together towards the same goals. Like Thorelli, he sees networks as having the potential for providing companies with the advantages of the two classical forms of organisation, i.e. hierarchy and market. In particular he claims (p. 16) that networks bring companies long-term planning security; the advantages of being in direct contact with customers and technologies; of keeping away from heavy bureaucratic structures; and of keeping the entrepreneurial drive of independent firms.

Despite the fact that most of these definitions are linked to the theory and practice of Western forms of organisation, networking structures may also be observed in the Asian continent and in particular in Japan. To the network structures set up in Japan the Japanese give the name of 'Keiretsu'. Similarly to the Western networks, 'keiretsus' are forms of network that are characterized by the following main aspects (Lincoln et al, 1992; Gerlach, 1992). Firstly, they involve a constellation of a variable number of organisations linked together by strategic alliances. Yet, they are viewed as responsible for costs and risk reduction; facilitating communication; ensuring trust and reliability; and providing insulation from outside (predatory) competition. Also, they are viewed as offsetting the market's failure, and improving communication among different companies. Forestalling both market failures and the pitfalls of rigid bureaucracy, they are, finally, viewed as a middle road between the extremes of arms-length transactions and hierarchical control.

Despite the amalgamation of products and organisations included in the tourism sector (see section 1.4) very surprisingly only few academics have looked at the tourism field from a

structural perspective, and in particular from a network approach. Among them, and in a pioneer study looking for relationships among groups of social tourism actors, Stokowski (1994, p. 73) sees social tourism networks on the basis of *how the living environments of every day community life stimulate leisure, recreation, and tourist behaviour*. In other words, she looks for an explanation from a structural rather than on an atomistic perspective. Emphasis is then moved towards the interactional context to the detriment of individuals. Also Pearce, in a forthcoming paper, provides a pioneer insight into the regional tourism organisation in the Catalonia region, proving how important to look at tourism administration from a network point of view is (Pearce, forthcoming).

It is also interesting to observe how the network concept is becoming part of the planners' vocabulary and research. Indeed, there is a growing amount of literature on planning providing useful insights into the way in which a number of networks have flourished worldwide, the impact they have had on the spatial organisation of a number of systems. For an expanded analysis of this theme see Murdoch, 1995; Li, 1995; Marsden and Arce, 1995; Perry, 1995; Marvin, 1994; Hutchinson, 1994; Palmer, 1994; Cook and Morgan, 1993; Healey and Williams, 1993; Cappelin and Batey, 1993; Stoker and Young, 1993; Sayer and Walker, 1992; Dicken and Thrieff, 1992; Hollis et al, 1992; and Walsh, 1991.

Nonetheless, from a planning point of view the notion of network which best contributes to this work, since it addresses three main areas of this thesis ('planning', 'organisations' and 'networks'), may be found in an edited book published by Amin and Thrift (1994) ('Globalization, Institutions and Regional Development in Europe'). However, due to the great level of similarity shown between the editions published by Amin and Thrift and Cappelin and Batey (1993) ('Regional Networks, Border Regions and European Integration'), the later publication cited several times on chapter 3, it is recommended both editions to be read together.

According to Amin and Ash, globalization and the proliferation of borderless organisations, discussed in section 3.3.3, have prompted a new organisational atmosphere in the world, where it does no longer make sense to think of places as isolated entities but instead as *territorial arena(s) of social interaction composed of difference and conflict, of related and unrelated connections, of social and economic heterogeneity, of parochial and universal aspirations, and of local and global determinants* (p. 9). Bearing this in mind they suggest that there is a new concept of 'territoriality' emerging in the world, which shows closer proximity to Marshall's concept of 'industrial atmosphere' ('neo-Marshallianism'). That is, organisations should be seen as entities connected to each other rather than as organic wholes; where the tasks of coordination and control turn out to be nowhere near straightforward; where firm-

organisation is often unstable; and where the dividing line between firms and their environments is porous and constantly changes; and where many firms have clearly outgrown agglomerations (pp. 11-12).

Following Amin and Thrift, this new atmosphere has prompted the development of three types of networks (pp. 13-14): the first involves members of different firms as well as relationships set up between firms and clients; the second type includes specialists bound together in interest groups, such as professional-social institutions; and the third is about tightly drawn interest groups which not only have shared specialist knowledge, shared interests, and shared attitudes, but also share a normative commitment to act in particular ways and to follow quite particular policy agendas.

One of the most important outcomes produced by the concept of network as proposed by Amin and Thrift is the notion of 'institutional thickness' (p. 14). According to them, networks are structures which incorporate not only economic transactions among firms but also a 'ritual' of social and cultural factors which support and strongly contribute to their success. To the economic and social structure created by the amalgamation of liaisons set up among organisations and the centripetal effects generated by those links is also given the name of 'embeddedness' (see Granovetter, 1985).

Amin and Thrift suggest four main factors which contribute to the creation and strengthening of 'institutional thickness' (p. 14). The first is the existence of a plethora of institutions of different kinds (e.g., firms, financial institutions, local authorities, government agencies, business service organisations, marketing boards, etc). The second is the existence of high levels of interaction amongst the institutions in a local area. The third is the development of sharply defined structures of domination and/or patterns of coalition resulting in the collective representation of what are normally sectional and individual interests and serving to socialize costs or to control rogue behaviour. The last is the development among participants of a mutual awareness that they are involved in a common enterprise. The concept of 'institutional thickness' may also be summed up as *the collectivization and corporatization of economic life, fostered and facilitated by particular institutional and cultural traditions* (p. 15).

Amin and Thrift argue that, although often not sufficient, as is demonstrated in other chapters of their book, 'institutional thickness' is a key factor which contributes (i) for institutions to reproduce themselves; (ii) for the construction and deepening of an archive of commonly held knowledge; (iii) for organisations to both learn and change; (iv) for the diffusion of innovation; (v) for the development of inter-organisational trust; and (vi) for the development of a sense of

inclusiveness, i.e. a widely held common project which serves to mobilize the region with speed and efficiency (p. 15).

Taking into account the importance of the implications associated with the notions of network and 'institutional thickness' as suggested by Amin and Thrift, two central objectives of this thesis will be, thus, to assess whether the Portuguese regional tourism organisation is made of a plethora of agencies orbiting around common objectives (see chapter 7), or whether there is room enough in this area for improving their cohesiveness in order to take full advantage of their close links and coordination (see chapter 8).

Another concept which is closely linked to the network theory is that of exchange. The exchange concept was pioneered in an article published by Levine and White (1961). Among others, Thompson (1967), Blau (1964), Emerson (1971), Jacobs (1974), Aldrich (1974), Benson (1975) and Cook (1977) provided additional and useful insights into this matter. According to Levine and White (1961, p. 120) exchange may be viewed as *any voluntary activity between two organisations which has consequences, actual or anticipated, for the realisation of their respective goals or objectives*. Similarly Blau (1964, p. 6) defines exchange on the basis of *actions that are contingent on rewarding reactions from others*. Emerson (1971, p. 3) defines exchange as *interaction relations between two parties based upon reciprocal reinforcement*. Cook (1977, p. 64) defines this concept as the *voluntary transactions involving the transference of resources (x, y, ...) between two or more actors (A, B, ...)*.

Another central concept associated with networks is that of power. Following Thorelli (1986, p. 38), power may be defined as *the ability to influence the decisions or actions of others*. Approaching this concept from other angle, Cook (1977, p. 65) prefers, instead, to define power as the capacity of an organisation to set up multiple links with its surrounding environment, making it less dependent on a few organisations.

According to Cook (1977, p. 65) literature focussing on network analysis tends to provide complementary definitions of 'power' and 'dependence'. For instance Thompson (1967, pp. 29-30) points out that *an organisation is dependent upon some element of its task environment (1) in proportion to the organisation's need for resources or performances which that element can provide, and (2) in inverse proportion to the ability of other elements to provide the same resource or performance*.

Literature focussing on the concepts of power and dependence has also increased significantly over recent years, as numbers of academics and practitioners have realized that the success of

an organisation does not exclusively depend on the organisation itself but also on the success of others, and on the way in which organisations interlock with their surrounding environment.

Bearing that in mind Knoke (1990, p. 93) argues that *the most powerful actors are the incumbents simultaneously holding key positions within both webs of informal relations to other organisation participants*. This claim supports some of Jarillo's arguments, when he states that *most companies under competitive pressure try desperately to cut costs, only to realize that this seriously impairs their ability to change: companies must organise themselves in radically different ways, and grow beyond their current organisational constraints, for the way a company organises itself has a huge impact on its results* (Jarillo, 1993, pp. 9-10).

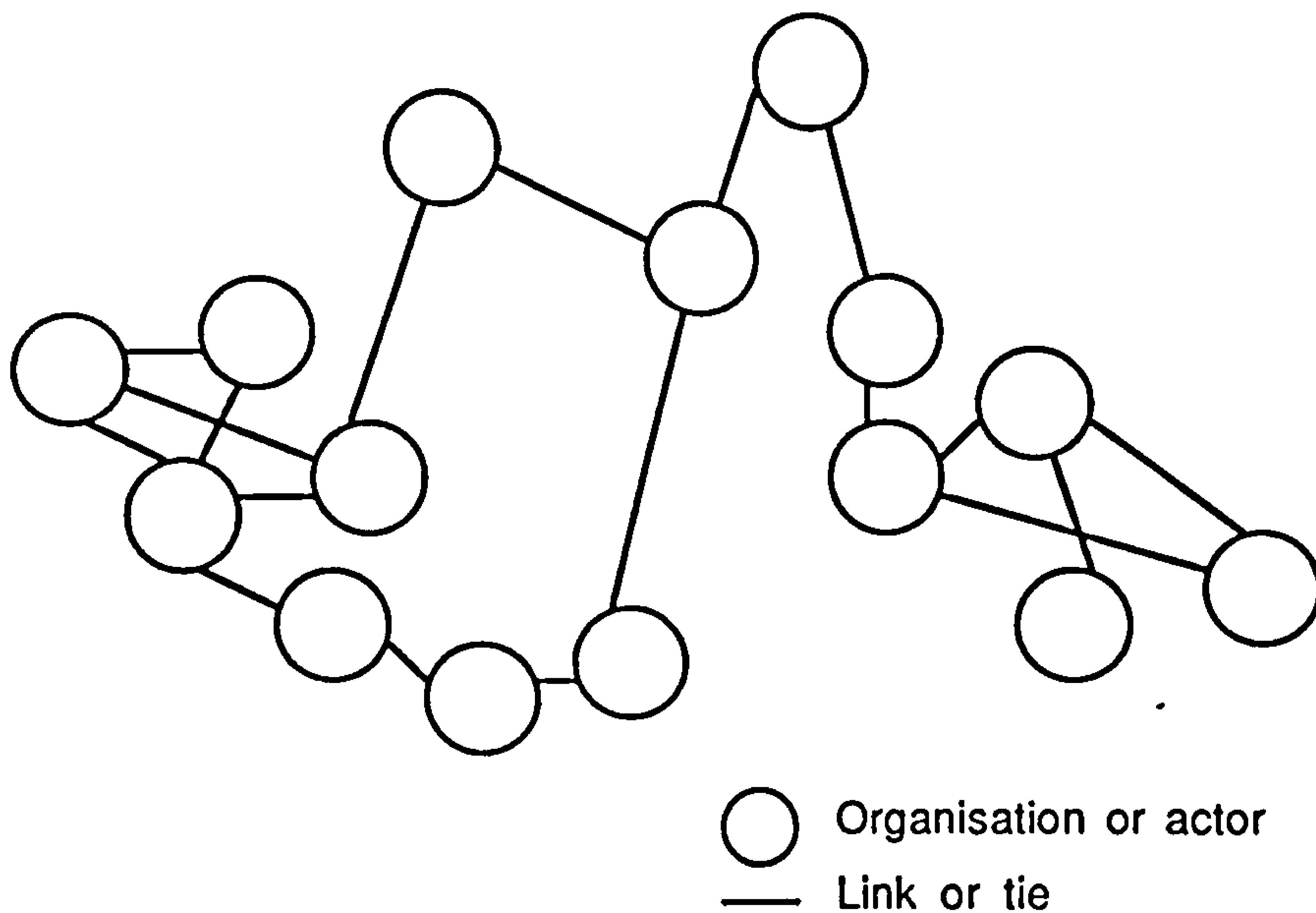
Expanding on this point Jarillo goes even further in his comments claiming that *organisation drives performance because it lays down, among other things, incentive systems and the ways in which people interact, thus determining their motivation and their ability to learn to develop new creative ways of doing things. Different strategic goals require different organisational characteristics, and the organisation that is better suited to the specific strategic needs of its time and its industry wins out* (Jarillo, 1993, p. 10)

Taking into account the above definitions of 'network', 'exchange' and 'power', the way in which the concept of network will be used in this thesis can now be clarified. Schematically represented in figure 4.1, network can be defined as an organisational structure whose operating philosophy may be placed between Weber's bureaucratic model (section 3.2) and the neoliberal or market philosophy (section 3.3). Networks are based on two or more (usually administratively independent) organisations which decide, by a formal or informal commitment, to engage in a medium- or long-term cooperation process involving the exchange of products and services (e.g. raw materials, management, technical personnel or labour, information, advice, expertise, know-how, etc). Their aim is to cut costs, increase market transparency and make the web more competitive in relation to other areas. A network is, therefore, underpinned by the premises that every organisation depends on the success of others and also that competition must be viewed beyond the region where an organisation is located.

4.4 Economic arguments supporting the network theory

Lorenz (1991, pp. 183-191), Knoke (1990, pp. 107-108) and Granovetter (1985) point out that most economists have paid little attention to the importance of the social ties set up among organisations. According to Knoke (1990, p. 107) *in neoclassical theory exchanges take place between rational calculative actors in a market, an anonymous, atomized setting where prices and quantities are set by a competitive bidding process. An invisible hand coordinates supply*

Figure 4.1 - Example of an hypothetical network of organisations



and demand. Social connections among the actors are absent (...) reputation, trust, reliability, and other interpersonal relations play no part in efficient transaction behaviour.

Despite these assumptions, and based on research carried out by a number of economists and sociologists, Mark Granovetter notably illustrates how *the behaviour and institutions (...) are so constrained by ongoing social relations that to construe them as independent is a grievous misunderstanding* (Granovetter, 1985, p. 482). The intrinsic relationships set up among organisations Granovetter calls 'embeddedness'. According to him, and in opposition to classical economic theory where it is argued that *the economy (is a) separate, differentiated sphere (...) with economic transactions defined no longer by the social or kinship obligations of those transacting but by rational calculations of individual gain* he elaborates on a point of view in which systems are viewed in an interconnected perspective, and where the economic rational is linked to social, and, thus, subjective, behaviours, and vice-versa.

In addition to this argument Benson (1975) suggests, in an article entitled 'The interorganisational network as a political economy', that forms of networking are not irrational or distorted market approaches but are, instead, forms of 'political economy', giving organisations renewed strengths with which to face the market's uncertainty on more safe ground. This point of view is also shared by Ouchi (1980, p. 132) when he points out that the market mechanisms imply that transactions *are fulfilled on the spot. However, the spot market contract is, by definition, incapable of dealing with future transactions, and most exchange*

relationships involve long-term obligations. Proceeding along this argument Lincoln et al (1992, p. 561) claim that *a network infrastructure constitutes a kind of 'visible' hand that moulds the market to the agendas of its participants,* and that must not be seen as heresy. In other words, *the economic actors (...) regard the market as too important to abandon it to the free play of market forces alone.*

The arguments introduced above by some sociologists have also found support among growing numbers of economists. Indeed, several economists have also suggested that the market functioning cannot exclusively be looked at from the angle of classical economic theory, because classical economic theory excludes things such as cooperation among organisations and strategic alliances, because they are viewed as being responsible for introducing distortion in markets.

Despite that, some economists claim that the creation of interlocking (e.g., networks) may bring markets some added value. The arguments which are usually utilized to support this claim are often grouped into three main economic theories: 'the zero-sum and non-zero-sum game', 'the prisoner's dilemma', and the 'tit-for-tat' strategy'.

In relation to the first one, the difference between cooperation and competition may be seen as the difference between a zero-sum game and a non-zero-sum game (Jarillo, 1993, pp. 129-130). In a zero-sum game the amount of money made by the winners is equal to the amount of money lost by the losers. In other words, what is won by some is lost by others. However there are situations in which all players may win. In other words, the money won by the players may come from somewhere, of someone, else. For instance, the money won by all *may be the money spectators are prepared to pay to enjoy watching the game. In that situation nobody loses: all the players get money from people who do not lose it, but are willingly exchanging it for some entertainment.*

In addition to this Harris (1994, p. 395) also suggests that *planning, like economics, deals with the allocation of public and private resources to the objectives of society. The available resources are a constraint on the fulfillment of these goals, but over time they are not fixed, so that planning need not be a zero-sum game.*

The second theory, the 'prisoner's dilemma', is a theory that suggests a situation in which two burglars (Peter and Paul) are caught by the police (for an expanded analysis of this theory see Axelroad, 1984; Jarillo, 1993, pp. 136-138; Johnston and Lawrence, 1991, p. 201). In the face of little evidence the police want them to confess their acts. Four situations may then happen (table 4.1).

Table 4.1 - Competition vs. cooperation - the prisoner's dilemma

Situation 1 (perfect competition) Peter talks Paul talks Sentence: Peter: 5 years Paul: 5 years	Situation 2 (imperfect competition) Peter does not talk Paul talks Sentence: Peter: 10 years Paul: goes free
Situation 3 (imperfect competition) Peter talks Paul does not talk Sentence: Peter: goes free Paul: 10 years	Situation 4 (cooperation) Peter does not talk Paul does not talk Sentence: Peter: 2 years Paul: 2 years

Source: Jarillo (1993, p. 137)

Situation 1 illustrates that when placed in direct competition, that is if both prisoners talk, they are both sentenced to 5 years in jail. In a situation of imperfect competition, that is, in a situation in which only one of them talks (situations 2 and 3), one is acquitted while the other is sentenced to 10 years in jail. However, such a situation is unlikely to happen, since both prisoners want to walk free or being sentenced to short imprisonment. Bearing that in mind, that is, taking into account that both prisoners want to walk free or take short imprisonment, then it is found that the best strategy to be followed by both is a situation in which they cooperate with each other by deciding not to talk. In doing so, both prisoners are sentenced to (only) 2 years in jail (situation 4).

The third theory, the 'tit-for-tat' strategy, is particularly well described in Axelroad's book entitled 'The Evolution of Cooperation' (Axelroad, 1984). Some of the assumptions supporting the 'tit-for-tat' strategy may also be found in the prisoner's dilemma theory. Again, it is argued that by cooperating with each other companies are likely to become more successful than engaging in some forms of predatory competition. Nevertheless, and as will be noticed, the theory does not exclude the importance of competition among companies.

The 'tit-for-tat' strategy specifies the following rule (Jarillo, 1993, p. 139-140): *start by cooperating, and, at any other stage do exactly what your opponent did in the previous move. That's all!* According to Jarillo, the strategy, which has been validated by empirical evidence (see Jarillo, 1993, p. 139), proves that by imitating and cooperating with each other the winning strategies, i.e. the best solutions to problems, reproduce themselves and improve the

type of solutions chosen for tackling the problems. Following Jarillo, this strategy has also the following advantages: *first, the strategy is 'nice' since it never starts a non-cooperative move by itself; second, it is 'provocable', i.e. it gets mad at defectors quickly and retaliates; third, it is 'forgiving', since retaliation is only proportional to the length of defection. These three good personality traits of being nice, provocable, and forgiving, seem to be the essence of both the robustness of the strategy and its survival in an aggressive environment.*

An important assumption supporting these three theories of cooperation relies on the fact that *the identification of cooperation with intra-company behaviour and competition with inter-company relationships depends on how one defines the boundaries of the 'company', i.e. the area within which cooperation reigns and outside which competition is paramount; for (...) the boundary between cooperation and competition does not have to coincide necessarily with the legal boundaries of a firm. There can be cooperation across companies, and competition within them* (Jarillo, 1993, p. 130)

These three theories of cooperation assume particular importance for the tourism sector if some of the comments which were raised in chapter 2 are taken into account. It has been shown that despite the growing number of tourist arrivals in Europe (sections 2.3.2 and 2.4.2), the European world share is sliding down (figure 2.14). Bearing that in mind, it seems sensible to argue that the EU partners should see competition not only within their own borders but also on a world scale. The strengthening of the relationships among all EU countries and the implementation of effective policies within the EU may bring new hope for dealing with this declining tendency. The 'non-zero-sum game', the 'prisoners' dilemma' and the 'tit-for-tat' strategy may help the EU partners to rethink the way in which tourism is viewed in Europe.

The advantage of strengthening cooperation among organisations should, however, not exclusively be seen on a world scale but on different scales. It is widely known that strong levels of, often predatory, competition affect the profitability and quality of Mediterranean 'sun-sea-sand' tourism (see for instance the case of Majorca, in Spain, described by Laws, 1995, pp. 12-13). Due to the strong bargaining capacity of a number of tour operators most Mediterranean destinations located in Greece, Spain, Italy, France, and Portugal, have to pull prices and quality down in order to attract a reasonable slice of this market.

Viewed in isolation from the rest of the world Mediterranean tourism may be seen as a zero-sum game. That is, the tourist flows which one country attracts are lost by others. Bearing that in mind it could then be thought that entrepreneurs in different destinies implement joint strategies in order to attract larger numbers of tourists to their regions. Based on the Portuguese situation chapters 7 and 8 will develop this matter, by reporting on whether such a situation

happens or on whether local entrepreneurs prefer, instead, to engage in direct competition with each other.

The proliferation of networks in a number of areas is a topic which is brought about by a growing amount of literature. For instance, Johnston and Lawrence (1991) describe how a close network of relationships was set up in central Italy in the textile industry: *Realizing that their partners must also be financially sound, efficient and marketwise, if they themselves are to be competitive, the players in the Italian VAP (i.e. Value-adding partnership) are eager to share information and cooperate. In recent years they have developed computer systems that rush information from partner to partner. The technology enhances coordination and boosts the speed and quality of responses to the market (...) Coordination is now the rule, not the exception. In fact, the ties exist not only vertically, but also horizontally, with what would usually be considered direct competitors* (Johnston and Lawrence, 1991, p. 191).

Based on this and on other examples Johnston and Lawrence also argue that *the power of the VAP is undeniable. To a great extent VAPs have the best of both worlds: the coordination scale associated with large companies and the flexibility, creativity and low overhead usually found in small companies. VAPs share knowledge and insight but are not burdened with guidelines from a distant headquarters. They do not have long forms to fill out and weekly reports to render. They can act promptly, without having to consult a thick manual of standard operating procedures. In an increasing number of industries, they are proving to be fiercely competitive against both large companies and small independents* (Johnston and Lawrence, 1991, p. 197).

For an expanded analysis of how successful networks have been implemented worldwide and brought companies more profits and long-term stable growth see Sweeting (1995), Li (1995), Ohmae (1995), Murdoch (1995), Marsden and Arce (1995), Perry (1995), Palmer (1994), Jarillo (1993), Marin and Mayntz (1991), and Thompson et al (1991).

4.5 Potential of interlocking directorships to implement networks

It is argued in literature focussing on network analysis that there are at present two main forms of network relationships (Murdoch, 1995, p. 742): subcontracting and strategic alliances. Whereas subcontracting is more typical of manufacturing, it is argued in specialized literature that strategic alliances are more adjusted to organisations which operate in the services field, due to the intangibility of a number of products that may be exchanged among organisations (e.g., information, strategies, policies, know-how, expertise, etc).

It is also argued that an effective way for implementing networks and other strategic alliances is by interlocking directorates (Baum and Oliver, 1991; Palmer et al 1985; Palmer, 1983; Stockman et al, 1985; Stearns and Mizruchi, 1986). By definition, interlocking directorships are organisational arrangements set up among organisations in which directors of different organisations sit on the board of other companies.

The arguments for the implementation of interlocking directorates are brought in literature under two different perspectives ('schools') (Palmer et al, 1986, p. 781). Under the 'interorganisational perspective' corporations create interlocks in response to their need for resources controlled by other organisations. According to the 'interclass perspective' corporate directors create interlocks in response to their need to organise themselves as a social class.

According to literature focussing on this topic, which is based on empirical evidence provided by several research studies (see in particular Baum and Oliver, 1991; Palmer et al 1985; Palmer, 1983; Stockman et al, 1985; Stearns and Mizruchi, 1986; Pennings, 1980), the creation of interlocking directorates bring organisations the following main advantages. Firstly, they facilitate the various forms of interfirm relationships: they allow partners to influence one another's board level policies; and they may constitute an important basis for further forms of interorganisational cooperation. Based on the Portuguese case chapter 8 will bring fresh evidence to these matters (see in particular section 8.2.11).

In second place, they ensure an easier and more predictable flow of resources to organisations; they increase the survival prospects of an organisation; they bring organisations a greater stability and predictability in their operations; and, therefore, they reduce the likelihood of failure. Chapter 8 introduces an insight into these matters which will help to demonstrate whether these claims may be applied to the Portuguese situation (see section 8.2).

In third place, literature also illustrates that interlocking directorships enhance the organisations' legitimacy, status and public visibility. It is also suggested that the survival of an organisation is significantly improved when it acts in conformity with the norms and social expectations of the institutional environment. The empirical evidence collected in Portugal will, again, help to demonstrate whether such arguments can be used in the Portuguese case (see section 8.2.12).

Last, but not least, it has also been suggested that interlocking directorships may provide organisations with the opportunity to exchange specific information about their operations or general information about the industrial sectors in which they are located. In addition, they may also afford directors direct interaction with other companies as well as steady communication channels which allow a more intense exchange of techniques, values, and beliefs. Palmer

(1985) adds to this the argument that interlocking directorates make directors generate a common business elite or capitalist class culture that engenders managerial behaviour and integrates newcomers into this culture. Again, an expanded analysis of this topic is introduced in chapter 8, where it will be examined whether such arguments find practical support when applied to Portugal (see in particular sections 8.2.7, 8.2.11, and 8.2.16).

Furthermore, Meeusen and Cuyvers (1985) point out, based on evidence collected in the Netherlands and Belgium, that there are situations in which the turnover of organisations is increased when directors of different companies sit on each others boards. Conducting research in the same field Pennings (1980, p. 65) also found a correlation between more centrally managed companies and less profitability.

In addition to all these advantages pointed out in general literature, the implementation of interlocking directorates in the tourism sector also seems of great importance for the following two main reasons. The first is linked to the nature and characteristics of the tourism industry (see section 1.4). As discussed, the tourism sector comprises a constellation of organisations, such as private sector operators, public sector agencies, non-profit organisations, as well as a number of other organisations that, although not directly linked to tourism, are, nevertheless, providers of products and services (see the comments about the supply-side definition of Smith (1988) in section 1.4). The evidence collected in Portugal will help to determine whether interlocking directorates may, indeed, constitute an effective way of bringing together all these multiple interests and, thus, improve the coordination of tourism policy (see section 8.2.3), as well as its efficiency and effectiveness (see section 8.2.9).

Furthermore, the discussion, introduced in chapter 2 shows that when planning is carried out on the basis of some few variables, tourism is unlike to fill all its potential (e.g., multiplier effect) and may even jeopardize the natural, social and economic environment (see section 2.3). In this respect, interlocking directorates may make an important contribution to tourism, since, by bringing together all organisations, its planning and management is based on a wider scope of matters. It is the aim of chapter 8 to account for this by discussing whether such assumptions are also shared by those involved in the Portuguese tourism industry (see section 8.2.8).

The second main argument for interlocking directorates in the tourism field is linked to non-profit organisations. It was discussed in chapter 2 that most non-profit organisations tend to assume a peripheral role in the tourism industry. Based on the Portuguese situation chapters 5, 7 and 8 will provide additional evidence to support this claim.

The importance of interlocking directorates for non-profit organisations may be summed up in three main arguments. The first one is linked to one of the previous arguments; that is, by bringing non-profit organisations into the planning decisions, policies become more comprehensive, better informed, as well as more adjusted to reality.

The second reason is linked to the visibility gained by non-profit organisations if they join networks. As pointed out above, research conducted into this area illustrates that organisations involved in interlocking directorates enhance their visibility, status and, as a result of this, they also become stronger in the sense that they have easier access to new sources of information and funding. That is, interlocking directorates may bring non-profit organisations the strengths that they, in practice, need.

The third reason is linked to the potential role that non-profit organisations may assume in a future society. Rifkin (1991) argues that with the automation of increasing numbers of industries and with the shrinking of the state, new sources of employment must be found in society. He claims that non-profit organisations may play an important role in future, such as replacing governments in the provision of leisure activities, entertainment, culture, sporting activities, etc. In this way non-profit organisations may become an important source of employment. To this potential 'sector' Rifkin gives the name of 'social economy' or 'third sector'.

The involvement of non-profit organisations in interlocking directorates must, however, be viewed from a different angle. Evidence collected by Oliver (1988, p. 545) suggests that direct involvement of non-profit organisations with other organisations may, on the contrary, bring them some disadvantages. Oliver supports her claims by arguing that directorate interlocking may drive organisations into fierce competition for scarce resources. Under such circumstances it is likely that the weaker, such as non-profit organisations, may find it difficult to compete with the stronger, i.e. some private and public sector organisations. Thus, interlocking directorates may be viewed, instead, as damaging to non-profit organisations. It is the aim of chapter 8 to provide an expanded analysis of this area, by assessing whether the importance of non-profit organisations increases or decreases if they join networks (see section 8.2.12).

4.6 Capacity of networks to convey information and induce innovation

Another important issue raised in some organisational analysis literature is linked to the networks capacity to convey information and induce innovation (see, for instance, Jarillo, 1993; Ohmae, 1995; Osborne and Gaebler, 1993; Sweeting, 1995; Li, 1995; Bellamy et al,

1995; Burt, 1980a,b, 1990; Galaskiewicz and Burt, 1991; Galaskiewicz and Wasserman, 1989; DiMaggio and Powel, 1983; Tushman, 1977).

Most literature focussing on this matter does it on the basis of evidence showing that there is *an inverse relationship between the amount of extra-organisational communication of an individual and his or her performance* (Tushman, 1977, p. 591). Based on empirical evidence collected from several UK companies Sweeting (1995, p. 91) also claims that *the best innovation examples identified by participating companies were characterized by more flexible, co-operative and motivated use of people through either a process of self-help and empowerment or more enlightened and less bureaucratic management practices*. The research conducted by Bolwijn and Kumpe (1990, in Sweeting, 1995, p. 88) also led them to conclude that *the innovative ability will be the defining characteristics of successful 1990s companies*:

Bearing that in mind authors, such as Tushman, suggest that organisations should create 'special boundaries roles', which are nothing but mechanisms (e.g., individuals, organisations, technological conveyors, etc) allowing an easier diffusion of information into organisations. The advantage of doing this seems obvious. That is, organisations may more quickly adopt new management and technological styles and, thus, increase their productivity, efficiency, the performance and motivation of the personnel, and, generally speaking, improve their profitability and competitive advantage.

It should nevertheless be pointed out that the exchange of information is not only seen in literature directed to organisations. Bellamy et al (1995) provide a useful article illustrating how organisations may also create 'special boundaries roles' with the public, in order to facilitate their access to information available within organisations. This article contains useful guidelines explaining how to improve the access of the public to information stored, for instance, in tourist offices (e.g., accommodation, transportation facilities, entertainment, etc). This theme is usually labelled in literature as EIP - exchange of information with the public.

Networks are seen in literature as organisational frameworks with great potential to facilitate diffusion of information because they strengthen connections among organisations and individuals. With this in view, Galaskiewicz and Burt (1991, p. 89) point out that *interpersonal contagion favours structural equivalence over cohesion*. According to them *contagion arises from role playing among people who perform similar roles*.

Oliver also argues that the strengthening of the relationships among organisations leads to higher levels of isomorphism. According to her, *isomorphism is the result of competitive pressures that force organisations facing the same set of environmental constraints to adopt*

similar characteristics relative to one another (Oliver, 1988, p. 542). Isomorphism then develops from the restructuring of an organisational field into an interconnected collectivity that pushes organisations towards homogeneity. In short, isomorphism is a process that emerges from the interconnectedness set up among organisations (DiMaggio and Powel, 1983).

It might nevertheless be thought that isomorphism may lead organisations to adopt the same operating styles, a situation which, soon or later, may reduce their competitive and survival prospects. However, based on research conducted by other academics, Oliver argues that *neither competition nor interaction will necessarily lead to reduction in organisational field*. To this she also adds that *the environment is highly deterministic in shaping organisational forms and destinies (...) homogeneity is induced by institutional rather than competitive forces* (Oliver, 1988, p. 545)

The potential offered by networks for conveying information and inducing innovation may be summed up in the following main points (Burt, 1980a). First, *research has shown that social integration is associated with early adoption of (...) innovations* (p. 329). The research conducted by Sweeting (1995) also points in the same direction. Second, *a set of persons socially integrated within a cohesive group will react similarly to an innovation. Persons connected by intense relations will have similar attitudes towards an innovation; adopting it at approximately the same time* (p. 330). Fourth, *marginal persons at the periphery of the social structure are not normally innovative and tend to discover innovations on their own* (p. 331).

Supporting the argument that networks may work as potential conveyors of information and innovation DiMaggio and Powel (1983, p. 152) claim that *networks create a pool of almost interchangeable individuals* responsible for conveying information to other organisations and professionals, which, according to Galaskiewicz and Burt (1991, p. 90) makes them professional communities of multiple positions, each with its own, internally reproducing beliefs and attitudes about professional work. (see also Sweeting, 1995).

Based on the Portuguese situation chapter 8 will evaluate whether the claim that networks may afford an easier diffusion of information and induce innovation find echo among those linked to the Portuguese tourism industry (see in particular sections 8.2.6 and 8.2.11).

4.7 Conclusion

It was seen in this chapter that despite their actuality the origin of the network theory may be traced back in the middle 1950s, when some public sector organisations discovered the

advantages of setting up mutual ties (inter-organisational cooperation). However, it has been since the 1980s, as a result of neo-liberalism, that the network theory has suffered its most important boost, as growing number of economists, politicians, planners, sociologists, psychologists, and so forth, have realized its potential when translated to the world of businesses.

It was seen before that most of the developments which have been launched since the 1980s, as discussed in the previous chapter, introduced profound changes in the way in which organisations operate at present. Nowadays, a growing number of organisations are led by technological factors; have become smaller, more flexible and more dependent on the surrounding environment; their development has become linked to services and not to heavy manufacturing; the world has increasingly become globalized; information technology has become a cornerstone of success; and nowadays the world tendency is towards the creation of transnational webs of organisations instead of independent and localized corporations.

It was also seen that networks bring organisations the advantage of the reasoning which is linked to hierarchies, and the flexibility and competitive ideal which is offered by markets. From bureaucracies they rediscover the principle that rigorous management and planning are essential for the functioning of an organisation. However, the scale in which an organisation is viewed is enlarged. That is, from a network point of view organisations should not be seen exclusively within their borders but also in terms of the surrounding environment in which they operate. From the market approach they import the notion that organisations must be guided by mission-driven rather than rule-driven objectives, and, therefore, competitiveness is a variable which assumes centre-stage in the way in which they operate.

The importance of networks for tourism seems enormous. Firstly, they offer planners an organisational framework in which more comprehensive, inclusive, participatory, informed, and democratic approaches may be put forward, because policies are not exclusively designed by planning agencies but are, instead, supported by a wider range of participants (see section 2.4.2). Furthermore, they bring destination areas the assurance that development is no longer viewed from a short-term economic approach; instead, the planning and development of resorts are viewed from a wider perspective, which comprises the surrounding natural, social and economic environment, and, therefore, takes into account notions such as uniqueness, carrying capacity and sustaining growth. Also, they bring the tourism industry the hope that economic growth is viewed not only in the short-term but also in the medium and long-term. By bringing more stability and competitiveness to the web, networks also bring more safety and profitability to private sector investments. Finally, networks bring governments the advantage that the development of tourism is viewed with respect to the natural and social patrimony; that

development takes into account the economic structure of every place; and also that, by stimulating the inter-organisational coordination of policies, the indirect and induced economic impact produced by tourism are maximized.

There is nowadays evidence which shows that growing numbers of (successful) networks are mushrooming worldwide. However, evidence also suggests that in most situations they involve private sector organisations, where the pressure for competition and success is particularly intense. As far as the public sector is concerned what is seen is that, in spite of their potential, few networks have been set up worldwide, as a result of the rigidity, low motivation and, generally speaking, red-tape in which most public sector organisations operate.

One of the objectives of this thesis is to show that there is growing awareness among the organisations associated with the tourism sector that, due to their potential, networks offer a valid alternative way in which tourism administration may move forward. However, it is also the objective of this thesis to show that the establishment of networks demands profound changes in the way in which organisations operate, and, therefore, that may be seen as a big problem. This and many other issues linked to the potential and shortcomings of networks are also examined in chapter 8.

Chapter 5

Planning, organisation and tourism in Portugal

5.1 Introduction

The previous chapters provided an expanded analysis of the way in which planning, tourism and organisations have evolved up to the mid-1990s (chapters 1, 2 and 3). Thus, it can be observed that both 'planning' and 'organisation' are volatile concepts since the form, content and premises on which they are supported change according to the evolution of society. As discussed, their progress in countries such as England and the USA has been based on a continuous replacement of paradigms which have marked important developments in society, such as the Industrial Revolution, World War II, the rapid economic expansion of the 1950s and 1960s, the world's economic slow-down of the 1970s, the evolution of neo-liberalism, the growing importance of civil society, the decline of technocratic approaches, etc. The objective of this chapter is to analyse now how these concepts have evolved in Portugal and discuss whether their progress has been subjected by the same type of influences.

It will be seen in the following sections that unlike countries such as Britain and the USA the development of these concepts in Portugal has been characterized by political events rather than by the scientific evolution of paradigms. There is indeed a clear line which marks Portugal's evolution over the last decades: the rise of the dictatorship in 1926 and the return to democracy in 1974. That is, the evolution of tourism, planning and organisation has been carried out on the basis of different premises, a situation which also explains why the Portuguese case was not discussed in parallel with the debate introduced previously. Hence, it would not be scientifically correct to establish a straight comparison between Portugal and countries such as

England and the USA when their evolution on these matters has been influenced by different events.

The chapter commences with a review of the socio-economic and political circumstances that marked the pre and post 1974 April Revolution periods, and the events discussed in chapters 2 and 3 are put forward in terms of their influence upon the development of the town planning system and of the administrative structure in Portugal (section 5.2).

Based on both the chronological outcomes that have affected the history of Portugal and the evolution of tourism worldwide, section 5.3 evaluates how tourism evolved in Portugal before the revolution (section 5.3.1), as well as during the last twenty years in terms of international tourism (section 5.3.2.1), domestic tourism (section 5.3.2.2), tourism supply and geographic distribution of tourist flows (section 5.3.2.3), the economics of tourism (section 5.3.2.4), organisation (section 5.3.2.5), the role and importance of public, private and non-profit organisations within the tourism organisation (section 5.3.2.6), planning and policy (section 5.3.2.7).

5.2 The evolution and prospects of town planning and administrative organisation

5.2.1 Town planning and organisation up to the 1974 April Revolution

Some of the most important characteristics of the present Portuguese town planning system may be traced back in the history of Portugal. Though it is not intention of this thesis to provide an expanded analysis of the history of the country one cannot move forward without mentioning the following most important past events. In addition to the references which are suggested below the following sources of information may be cited for an expanded analysis of the characteristics and evolution of the Portuguese town planning system: Gonçalves (1984), Portas (1986, 1987), Ferrão (1987, 1990), Antunes (1987), Babo (1989), Campos (1988), Cardoso (1990), CCRN (1986), Gaspar (1985), Ferreira and Opello (1985), Henriques (1987), Mozzicafreddo et al (1988), Oppello (1985), Lopes (1985), Corkill (1991), and Graham and Makler (1979).

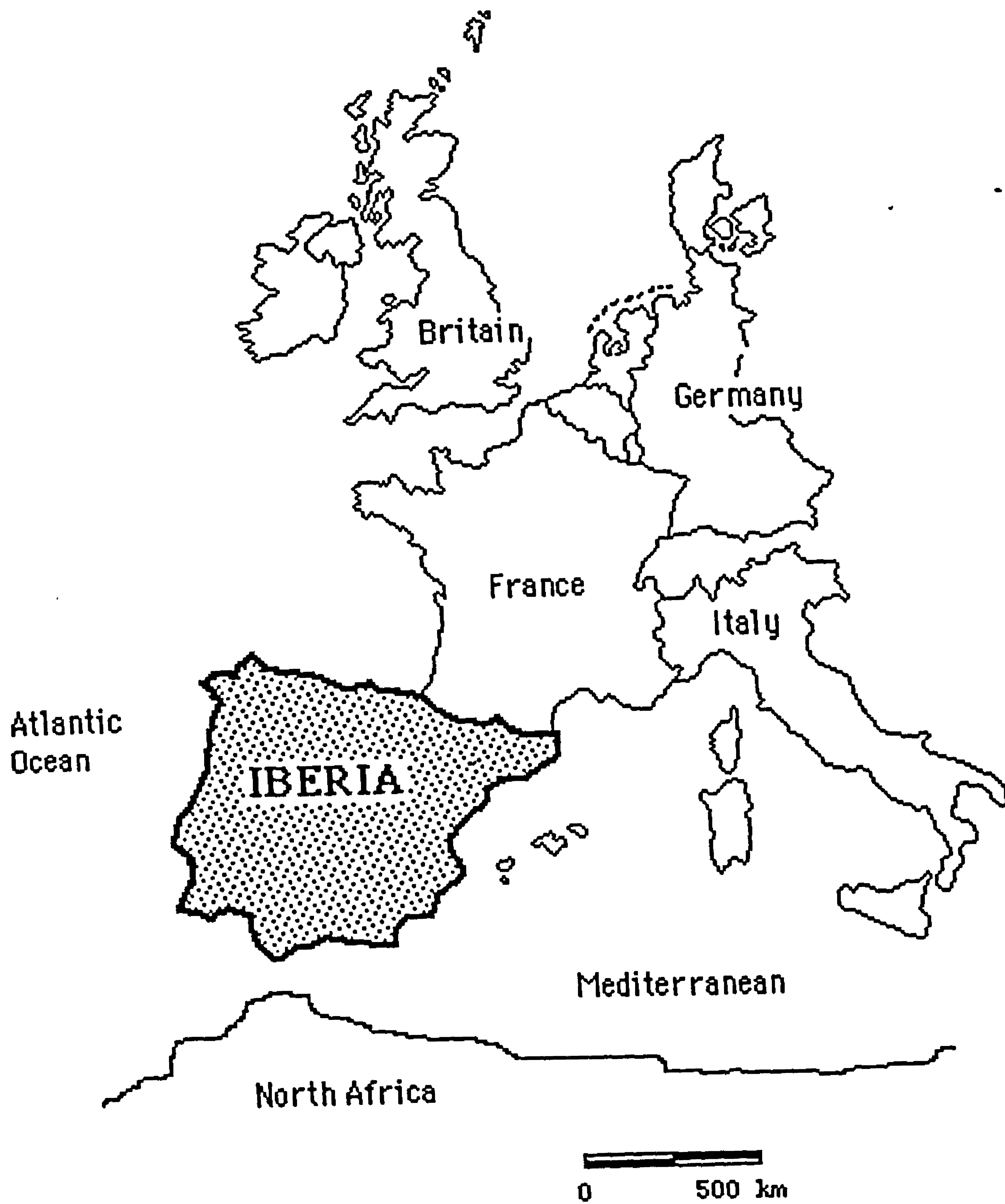
During the occupation of the Iberian Peninsula by the Romans, in the area which later gave origin to the Kingdom of Portugal, most settlements and roads were built along the coastline. Such a situation, fueled by other further events, explains partly the reason why even nowadays the littoral area is more developed than the interior.

It was however between the 12th and 14th century, when the Portuguese expelled the moors from the western part of the Iberian Peninsula (see map 5.1), that the Kingdom of Portugal was created. Whereas the northwest part of Iberia was already occupied by Portuguese settlements, the central and southern regions were conquered from the moors and offered to conquerors, either military orders or individuals, as large estates. According to Oliveira (1983, p. 68) this explains the present land tenure system with much larger holdings in the south than in the north, where they have been further fragmented by the subdivision of inherited property. Such a situation also partially explains why the south comprises large size municipalities whereas in the north small size local authorities prevail (see map 5.2), as well as why most of the central and southern RTBs comprise vast areas whereas most of the RTBs present in the northern part of Portugal are highly fragmented (map 5.6).

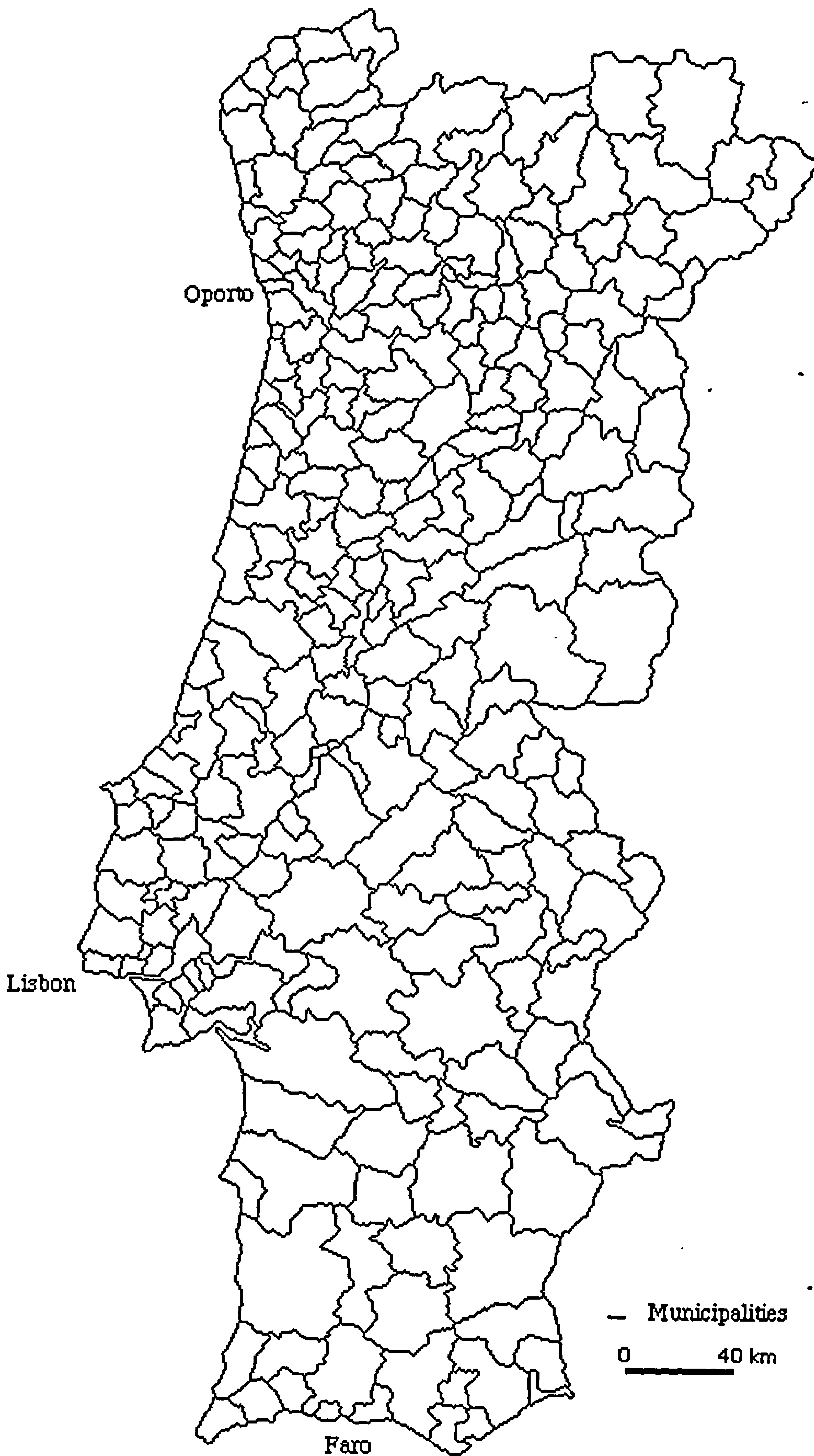
During the time of the navigators, and with the creation of the Portuguese empire (XV - XVII centuries), the development trend introduced in previous centuries remained unchanged. It was in the littoral areas that ports started to mushroom, working as gateways between Portugal and its colonies which were spread all around the world (Africa, America, and Asia). Lisbon became then the most important Portuguese port and, as a result of that, started to grow very rapidly. According to Oliveira (1983, p. 71) *for many years the Portuguese economy has been dependent on the outside world. The role of the ports and maritime connections have been vital to economic activity in Portugal. Raw materials are mostly imported and exports are carried in ships (the increase in heavy international road transports TIR - being an exception). Thus, those locations far from the harbours are naturally at a serious disadvantage.*

The liaison between the Portuguese development process and the coastal areas has been strengthened over the last decades on account of the following reasons (Oliveira, 1983). To begin with, the unfavourable topography and soil fertility of the interior have constituted a handicap to the attraction of population and economic activities. Furthermore, most salary scales are uniform throughout the territory. *Without incentives to move to the interior, professionals prefer to stay in Lisbon and Oporto or at least on the coastal strip. Thus, a vicious circle is established: lacking the 'proper atmosphere' in the periphery, higher grade staff do not settle there; as they are essential to any economic improvement, the situation remains unchanged* (Oliveira, 1983, p. 71). Also, the access by land to Spain has always been a problem. Despite the strong improvements introduced over the last 10 years, as a result of the adhesion of Portugal to the EU (January 1986) and the transference of large sums of money from the ERDF (see section 5.3.2.7), the access by road to Spain is still a big issue. In addition to this the Spanish regions bordering Portugal are amongst the most poor regions of Spain (e.g., Galicia

Map 5.1 - The Iberian Peninsula



Map 5.2 - The Portuguese Municipalities



and Andaluzia), a situation which also helps to explain the lack of interest of the Portuguese government in the past to improve the accessibility to Spain.

As a result of these circumstances, the Portuguese socio-economic development is characterized by wide regional disparities (DGAA, 1993; INE, 1994). Though comprising an area of 5% of the territory, about 40% of the population live in great Lisbon (Lisbon and metropolitan area) and great Oporto, the two largest Portuguese cities (see map 5.2). Furthermore, although accounting for about 32% of the Portuguese territory, 77% of the Portuguese population live in the coastal strip comprehending the districts⁴ of Viana do Castelo, Braga, Oporto, Aveiro, Coimbra, Leiria, Lisbon and the northern part of the Setúbal district (see map 5.3). This area accounts for about 4/5 of the GDP and for about 9/10 of the manufacturing production. In the remaining 68% of the territory (the interior) live a small share of 23% of the population, which is responsible for an output of 1/5 of the GDP and of 1/10 of the manufacturing production.

It is undeniable that all these past events (the Roman Empire, the invasion of the Moors, and the time of the navigators) have strongly influenced the present spatial and socio-economic development process in Portugal. Despite their importance, the characteristics of the present Portuguese planning system must also be found in the recent past.

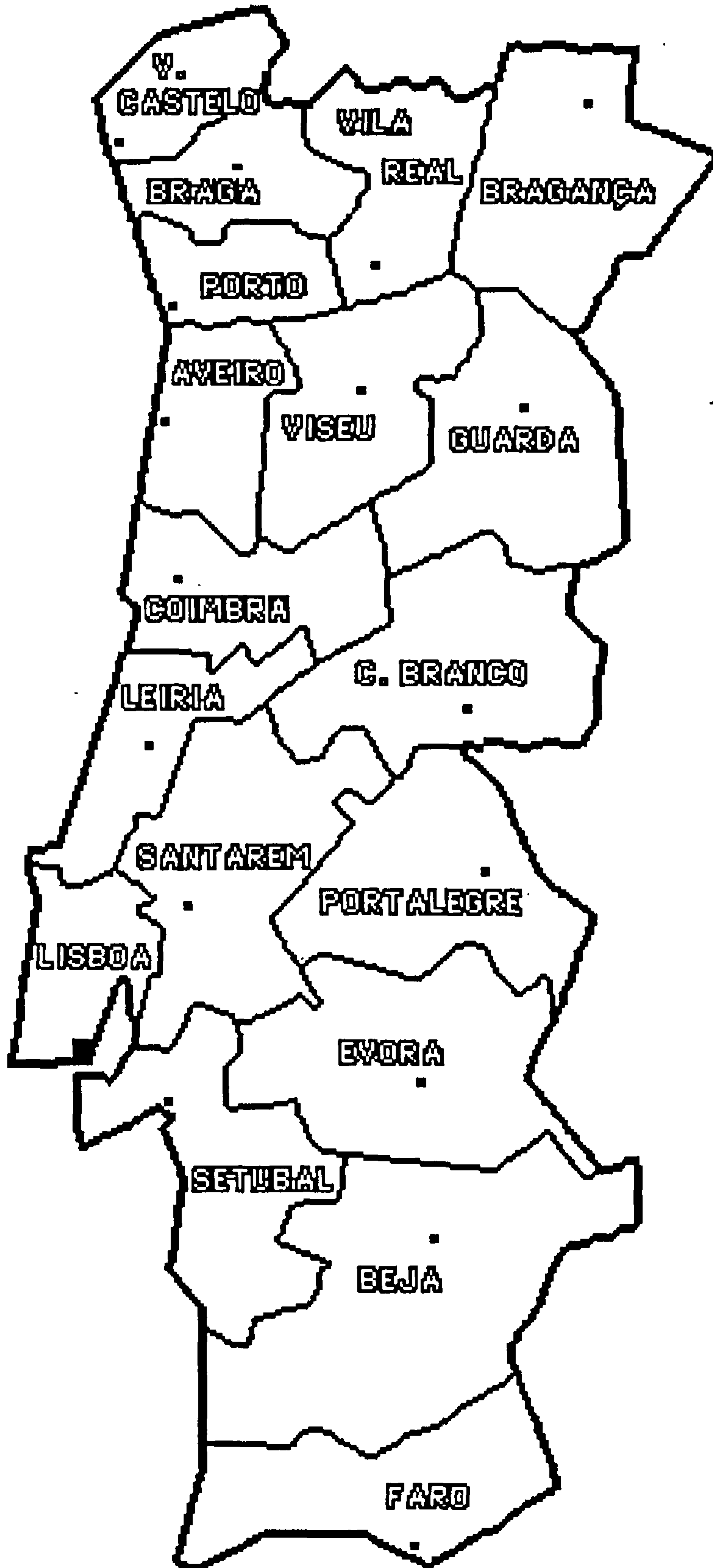
Gonçalves (1989) provides a remarkable discussion about the way in which the Portuguese town planning system has evolved over this century (see also Quadros, 1989; Rosa Pires, 1992; Oliveira, 1983; Taveira, 1984; Syrett, 1993, 1994). He points out that the Portuguese local authorities lost their administrative and financial autonomy in 1926 with the implementation of the dictatorship in Portugal. Seeking to improve the budget of the country, Salazar, the man responsible for ruling most of the 48 years of dictatorship (1926-1974), decided then to transfer to the central government a number of taxes previously collected at local level by municipalities. As a result of that, as well as of other subsequent events (such as the presidents of municipalities starting to be appointed by the national government), local authorities lost a large share of their administrative and economic autonomy.

In addition to that, most policies implemented during the dictatorship, through five 'Planos de Fomento'⁵, led the country to a profound stagnation. It is stated in the two initial 'Planos de

⁴ The Portuguese districts comprise groups of municipalities. Their presidents ('Governadores Civis') are directly appointed by the national government. Their role is restricted to security and public order.

⁵ 'Planos de Fomento' were five year national plans set up in Portugal during the dictatorship. Five Planos de Fomento were put into practice during the dictatorship (I: 1953-59; II: 1959-64; Intercalar: 1965-67; III: 1968-72; IV: 1974-79. The implementation of the last one was, however, stopped in April 1974 by the Portuguese revolution.

Map 5.3 - The Portuguese Districts



Fomento', which defined the options of the government up to the middle 1960s, that Portugal should not follow the industrial development process adopted in other European countries, because industry would destroy Portugal's rural characteristics. Political objectives were, of course, designed on the basis of such options. It was only in the third 'Plano de Fomento', implemented in the late 1960s, that the green light was given to the development of industry, though restricted to some very few sites located in the littoral areas (e.g., Estarreja, Sines and Seixal). The intensification of the military involvement of Portugal in the African colonies (e.g., Angola, Mozambique and Guinea-Bissau) and the growing costs attached to the operations of the Portuguese army fighting a better organised and equipped guerrilla army (backed by the former USSR), are usually viewed as responsible for this shift in the policy followed by the Portuguese government.

In some features, the administration set up by the dictatorship shows several similarities with the Weber bureaucratic model (see section 3.2). Indeed, during the 48 years of dictatorship all decisions were taken by the national government, supported by a number of 'core bureaucrats' working in the national ministries (see section 3.2.1). Also, all policies were viewed from a top-down approach, in which a group of central 'master minds' was responsible for taking all decisions (see section 3.2.4).

In addition to the political and economic options discussed in the above section, it is now possible to understand why local authorities lost their economic and administrative autonomy. Indeed, the organisational framework implemented by the dictatorship was based on the principle that all decisions should be taken at the national level and also that such decisions should be similarly implemented downwards by low-order organisations (see figure 3.1). In other words, the aim of the dictatorship was to establish an organisational structure able to ensure the full control of the system.

As a result of the socio-economic and political options adopted during the dictatorship Portugal became an isolated, rural, and centralized country. In opposition to the socio-economic and town planning developments followed in other countries (see chapters 2 and 3) the Portuguese town planning system was restricted to a piece of legislation published in 1934 (DL 24082). This legislation made the implementation of plans in all urban agglomerations with more than 2,500 inhabitants compulsory ('Plano Geral de Urbanização') (see Gonçalves, 1989; Rosa Pires, 1992), and was also further used to control the tourism development process in the first tourist resorts launched in Portugal (see section 5.3.1).

However, this legislation proved ineffective on account of the following reasons. First and foremost, the classic planning principles passed by the legislature had already shown their

inadequacy in other countries, because they were inflexible, rigid, technocratic, authoritarian, deterministic, and based on a restricted number of sciences (architecture and civil engineering) (for an expanded analysis see section 2.2.1). Furthermore, the 1934 town planning legislation was passed with the exclusive aim of controlling urban development processes. That is, it failed to respond to the problems of the countryside (see Gonçalves, 1984, 1989). Also, between 1944 and 1971 not a single plan was approved by the government. As pointed out by Sá (1989, p. 49) the result of that may even nowadays be observed in the lack of quality of a number of developments (built environment) spread all around the country.

Yet, in the middle 1940s there were only two (physical) planners in Portugal. Furthermore, there were no planning schools in Portugal. That is, planning was viewed as a discipline learnt from practice (Rosa Pires, 1992). In addition to that, planning was an activity focussing on the physical development of equipment and infrastructure (regulative planning). In other words, up to the early 1980s there was no such thing as regional and local strategic planning. Finally, the full control of the spatial development process was centralized at national level, for which there was a ministry ('Ministro das Obras Públicas'), the headquarters of which was located in Lisbon, and was responsible for coordinating and supervising all operations as well as for taking all decisions.

Comparing the evolution of the Portuguese planning system with the discussion introduced in chapter 2 many differences may be noticed. Whilst in countries such as England and the USA the evolution of town planning was based on the continuous creation and replacement of paradigms (e.g., classic and rational planning); on the creation of strong planning schools; on wide debates and on the questioning of the strengths and weaknesses of previous planning experiences; etc; none of that happened in Portugal. Conversely, the Portuguese town system was restricted to a single piece of legislation, whose principles were based on the classic planning paradigm, abandoned in other countries decades before. In addition to that, there were only a handful of (physical) planners responsible for all town planning matters. Also, the Portuguese 'planning theory and practice' was not subject to discussion. Last, but not least, there was a rift between state and society which prevented the introduction of improvements into the system.

It was, nevertheless, during the dictatorship that several attempts were made to improve this situation. Several foreign planners and some nationals were invited by the government to propose alternatives designed to improve the Portuguese planning system. Accordingly, several commissions and working groups were set up (e.g., Agache proposal (1932/34); Groer proposal (1948); the Oliveira working group (late 1950s); the Almeida working group (1971)). However, no one policy emerged from these working groups that was put into practice, and, as

a result of this, the Portuguese planning system remained unchanged up to the late 1970s (for an expanded analysis see Gonçalves, 1989, pp. 255-260).

5.2.2 Town planning and organisation after the 1974 April Revolution

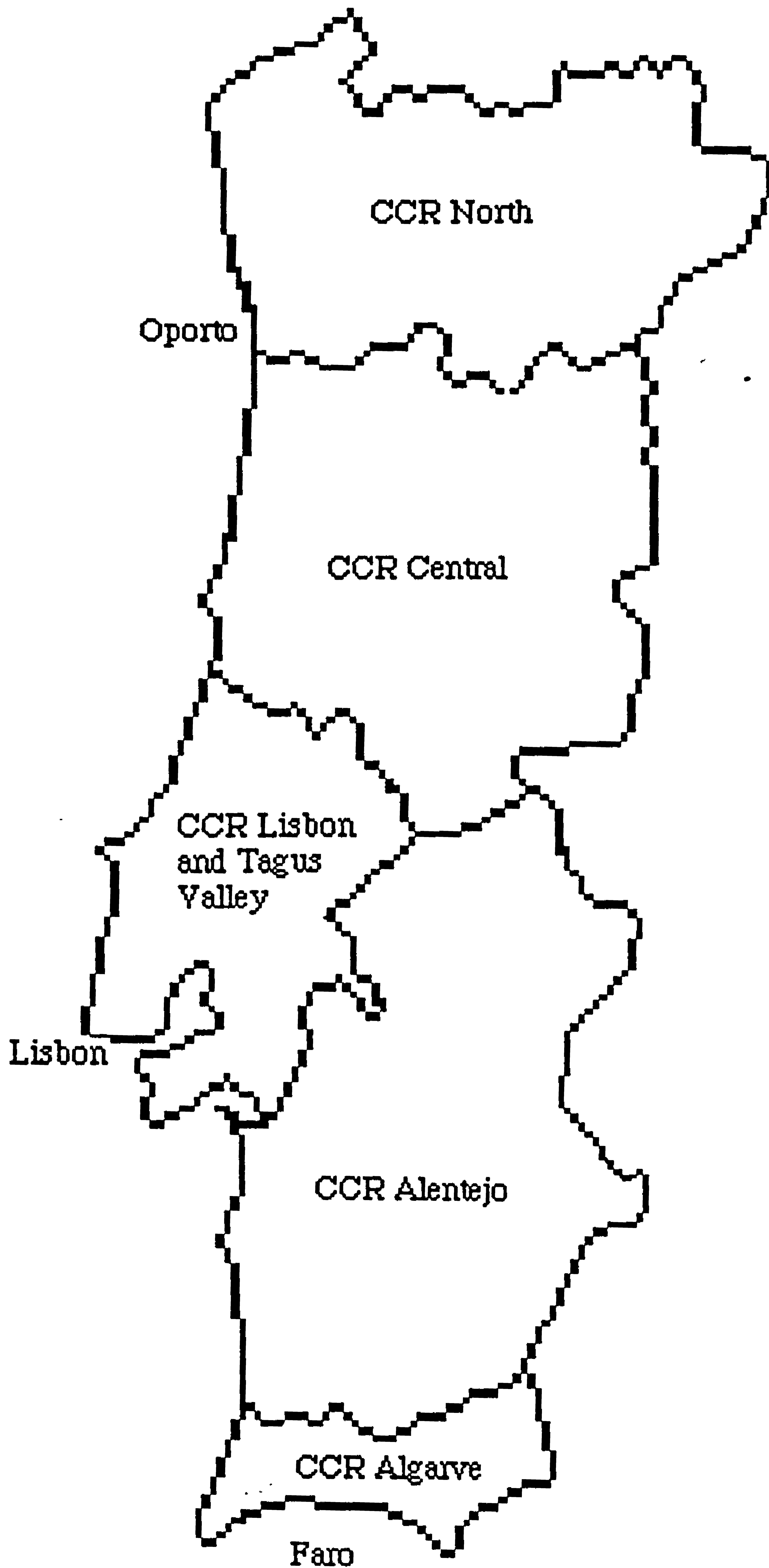
It was only with the overthrow of the dictatorship by the 1974 April 25 Revolution that changes started to be introduced into the Portuguese planning system. Indeed, an important policy which emerged from a working group set up in the aftermath of the revolution (Nuno Portas working group), was that the national government should restrict its actions to general policies, while the control of the development process should be passed to municipalities (see Gonçalves, 1989, pp. 260-61). A new philosophy based on decentralization and power devolution then started to emerge.

Despite being rooted in planning matters, the scope of the discussions that took place in Portugal after the revolution was much broader than might be thought. Above all, the key issue introduced by the Nuno Portas working group was linked to the need to replace the old centralized and bureaucratic state, established during the dictatorship (see section 5.2.1), for a decentralized one.

In addition to the restoration of democracy, the Portuguese revolution was also responsible for changing the role of the national government. Indeed, before the revolution Portugal was a country isolated from Europe, whose economy, as well as social life, was tied to the African colonies. As the African colonies gained independence in 1974/75, the national policy was then changed, and membership of the former EEC assumed top priority.

A new philosophy was introduced into the administration. In place of the former autocratic and centralized state, Portugal started to evolve towards a more decentralized state in which growing importance was placed on low-order organisations. For instance, the municipalities started to gain the autonomy lost in 1926. Also, five regional planning commissions were created after the revolution in order to move planning decisions closer to regions and local authorities (see map 5.4), and in the mid-1990s the discussion is now centred on the creation of administrative autonomous regions with similar characteristics to those set up in Spain, Germany, France, etc. In short, the priority has been to create a decentralized and democratic state in which development is also viewed from a down-top approach and in which both municipalities and regional authorities would have a say in national decisions, according to the discussion introduced in sections 3.3.5 and 3.3.6. The growing internationalization of the Portuguese

Map 5.4 - The Portuguese Regional Planning Commissions
(‘Comissões de Coordenação Regional’ - CCRs)



economy, associated with world globalization, the expansion of private sector, and the advances introduced in IT (see section 3.3) are also factors which have led to the implementation of more decentralized and down-top approaches in Portugal.

Fueled by entry in the EEC in 1986, new legislation has been set up in Portugal. At local level new legislation was passed in 1982 (DL 208/82), with further improvements in 1990 (DL 69/90), giving rise to the first comprehensive planning forms put forward at local level (PDM⁶). In other words, the regulative approach of 1934 was substituted for a more embracing one, following the trend previously adopted in countries such as England (see sections 2.3 and 2.4). Since then planning has started to be viewed in a more comprehensive way involving socio-economic objectives, quality of life, etc. In the middle 1990s the vast majority of the 305 Portuguese municipalities have already had plans approved by the national government.

As mentioned above, in 1979 the government decided to establish five regional planning commissions ('Comissões de Coordenação Regional (CCR)' (DL 494/79)), that is decentralized agencies of the ministry of planning⁷ (map 5.4), in order to reduce the scale of operations at national level (decentralization); to ensure that national policies were adjusted to the specificity of each region; and to improve the coordination of national planning policy with other regional strategies.

After the revolution a number of other regional policies and strategies were also set up to allow better coordination and utilization of resources among municipalities. For instance, regional planning strategies were established in several parts of the territory (e.g., PROTs, PIDRs PDIMs, OIDs, etc⁸); new legislation focussing on woodland expansion and zoning was also passed during the 1980s (PAF⁹). In addition to this a number of other laws were also enacted during the 1980s, with the aim of enhancing the living standards of the Portuguese population, such as Environmental Impact Assessment/EIA; pollution control (air, water, noise, disposal of solid wastes, sewage treatment); etc.

Despite the achievements of the last 20 years there is still room for further improvement. It is undeniable that Portugal, in the middle 1990s, has already modern legislation allowing better

⁶ PDM (Plano Director Municipal) - Local development plan

⁷ The Portuguese regional planning commissions (CCRs) report to the Ministry of Planning. However, in their early days of functioning (1979) they were answerable to the home office department ('Ministério da Administração Interna').

⁸ PROT (Plano Regional de Ordenamento do Território) - Regional development plan

PIDR (Plano Integrado de Desenvolvimento Regional) - Regional integrated plan

PDIM (Plano Director Inter Municipal) - Local development plan involving two or more municipalities

OID (Operação Integrada de Desenvolvimento) - Strategy of regional integrated development

⁹ PAF (Política Agrícola Florestal) - forest planning policy

planning and management of its resources. However, comparing the Portuguese situation with the development of the planning system in other countries (see section 2.4), the following comments must be made.

First of all, in terms of the present trend observed in other countries towards more openness between planning and society (see section 2.4) many things are yet to be done. In a remarkable article focussing on the (lack of) legality of the Portuguese planning system Quadros (1989) presents a 14 point list where he demonstrates that the Portuguese planning system operates apart from society, almost as a state within the state.

Among the most critical matters undermining the functioning of the Portuguese planning activity he draws attention to the following issues: planning often benefits private interests in detriment to public ones; the Portuguese planning practice shows that in a number of situations planners do not attempt to bring about the best solutions to problems; often planners are not neutral in their approaches; many planning approaches strongly conflict with the principle of equality among citizens; the planning activity does not follow the principle of the separation of power between different organisations; etc (for an expanded analysis see Quadros, 1989). In short, the Portuguese planning system is still involved with a number of problems that emerged in other countries during the rational paradigm phase of the 1950s and 1960s (see section 2.3.1).

Secondly, despite the present trend towards public participation and inclusive approaches (see section 2.4) most Portuguese planning lacks public involvement. Based on that Quadros (1989, p. 282) suggests that planning practice is undermined by illegality. Furthermore, comparing the trend observed in other countries with the Portuguese case Rosa Pires (1992) also argues that much has to be done in this matter, because most local plans (PDMs) lack public participation. In particular he argues that many local politicians have not yet realized what public participation is all about, giving the example of a president of a municipality who, commenting on this matter, stated that 'public participation would involve taking all the citizens to a football stadium to discuss the problems'.

Thirdly, in spite of the assumption in other countries that planning must be closely developed between professionals (decision-making) and politicians (decision-taking), because both are parts of the same enterprise (see sections 2.3.1 and 2.4.1), evidence shows that there is little discussion between planners and politicians (Sá, 1989; Mozzicafreddo et al, 1991; Portas, 1986), since a number of Portuguese planners believe that they have the right skills to solve problems, and also that planning matters should be viewed exclusively from a 'professional'

point of view. This argument has many similarities to the rational planning attitudes previously discussed, and also strongly criticized, in section 2.3.1.

The need for more rapid and pragmatic approaches, discussed in section 2.4, has already found echo in the Portuguese government. In particular, with the introduction of new legislation in the early 1990s (DL 69/90) most of the time and money consuming analyses of the local planning approaches of previous years (DL 208/82) have been simplified. However, some criticism has also been raised against this. It is in particular argued in literature that while seeking to speed-up the planning process a number of planners have adopted cheaper and low quality solutions. For instance, Rosa Pires (1992) claims that there are situations in which the same planner is responsible for several projects. According to him, this leads to the creation of a gap between 'office solutions' and reality, because it is difficult for plan coordinators to be simultaneously aware of the specificity of the issues raised in different regions. He also comments that the simplification of the planning process has led to simplistic diagnostics and surveys, which are often used to excuse the lack of quality of a number of plans.

Furthermore, nowadays the trend is towards the implementation of more comprehensive, informed and horizontal planning approaches (see sections 2.3 and 2.4). Despite that Sá (1989, p. 52) argues that the individualistic and fragmented attitude as well as the old fashioned operating styles followed by a number of Portuguese national departments (e.g., environment, agriculture, planning, industry, communications, etc) have created problems with regard to putting this new philosophy into practice.

Finally, as far as the globalization process is concerned (see section 2.4) it is noticed that important steps have already been taken in Portugal. In particular, the EU membership has pushed the planning system towards an unprecedented evolution. Planning in Portugal is no longer exclusively viewed from within the country's borders but also within an European context.

For instance, most of the legislation which was passed over the last two decades has taken into account not only modernization imperatives but also the need to make the Portuguese legislation compatible with the EU directives. Yet, the new road and rail network plans have been designed and implemented with the aim of improving not only internal accessibility but also the accessibility to other foreign countries. Furthermore, important transnational networks have been set up between some Portuguese regions and other foreign areas (see Figueiredo, 1993; Pimpão, 1993), a situation which is viewed as responsible for having fuelled the attraction of growing numbers of foreign corporations to Portugal; for having allowed a more rapid diffusion of innovation, working styles, ways of thinking; etc. In short, the EU membership of

Portugal, and the renewed relationship established with the former African colonies (PALOPs¹⁰), have strongly influenced the (global) way in which problems are nowadays tackled in Portugal.

5.3 The evolution and prospects of the tourism industry and of tourism planning

5.3.1 Tourism up to the 1974 April Revolution

The origin of 'tourism' in Portugal may be traced back to ancient civilizations that occupied the Iberia Peninsula (map 5.1). As described in chapter 2 forms of tourism may be found in almost all civilizations. The historical remains left by the Romans in many parts of Portugal (e.g., baths, arenas, gymnasium, etc) are living examples of that (for an expanded analysis see section 2.2.2).

After the establishment of the Kingdom of Portugal, during the XII century (see section 5.2.1), some parts of the country were used by a number of monarchs as important leisure areas. For instance, Sintra, close to the capital, and Évora, in the Alentejo Valley, were sought by the Portuguese kings as their favourite leisure areas. The same regions were also amongst the favourite destination areas of a number of Portuguese writers, as documented in literature describing Portuguese society at the end of the nineteenth century (e.g., Eça de Queiroz).

The origin of modern Portuguese tourism must, nevertheless, be traced back to the early years of this century. A book published by Paulo Pina entitled 'Portugal - tourism in the twentieth century' (Pina, 1988) provides an excellent discussion of the way in which tourism evolved in Portugal from the beginning of this century up to the late 1980s, and, therefore, is an important reference for all researchers interested in the events that made up the history of tourism in Portugal during this period. The history of Portuguese tourism prior to the XXth century may also be found in an article published by Pina (1991). Cavaco has also published literature focussing on this, and others, areas (see Cavaco, 1979, 1980, 1981, 1995).

There are, nevertheless, some handbooks which provide important information about the evolution of tourism legislation in Portugal (e.g., Ferreira, 1995; Cunha, 1987; Carvalho, 1984). Among the literature which focuses on a wide range of topics (e.g., economics,

¹⁰ PALOPs is an abbreviation used in Portugal which means all the former Portuguese speaking African colonies (Angola, Mozambique, Guinea-Bissau, Cape Verde and Saint Tome and Principe). In an Anglo-Saxon style it could be said that PALOP is a kind of Commonwealth of Portuguese speaking countries. Being in its early stages of development this association is mainly based on friendship and cultural exchange.

organisation, geography, education, etc) one may cite the following references: Silva, 1989; Costa, 1991; Rosa Pires and Costa, 1992; Lewis and Williams, 1991; Edwards and Sampaio, 1993; Curado and Carneiro, 1995; Boniface and Cooper, 1994; Bennet, 1986; Clarke, 1988; Seekings, 1989; Kendell and De Haast, 1986. The information and statistics published by the Portuguese General Directorate for Tourism (DGT), the National Institute for Statistics (INE) and Secretary of State for Tourism (SET) are also important sources of information which must be used by researchers interested in Portuguese tourism. It should nevertheless be pointed out that *Portugal is particularly poorly represented in the English language research literature on tourism because, as in so many matters, it lies in the shadow of its much larger neighbour, Spain* (Lewis and Williams, 1991, p. 107).

It is also observed in the above literature that most of the illustrations about the history and evolution of the Portuguese tourism organisation are based on Pina's (1988) handbook. Taking also into account that his book provides a comprehensive discussion of the problems which will be analysed here, most of the chronological events that are reported below were extracted from his book.

The beginning of modern Portuguese tourism may be traced back to 1906, when the 'Sociedade de Propaganda de Portugal' (SPP), the first Portuguese tourism agency, was established. Based on several reports Pina describes particularly well the chaos in the tourism sector in the early days of this century: the quality of most hotels was very poor and most of them were even considered as inadequate for travellers; there were no motor cars; the most used mode of transport was horse drawn carriages; and the quality of most roads was appalling.

Based on these problems the SPP brought to the top of the tourism agenda three main priorities: to increase the awareness of the Portuguese government of the tourism potential; to stimulate the development of an infrastructure and equipment able to boost the expansion of tourism; and promotion. With regard to promotion, the SPP was responsible for pioneering Portugal's promotion abroad (the first action included the publication of a poster advertising the country as 'the shortest way between America and Europe'), as well as for bringing to Portugal operators interested in the Portuguese market (1913 marks the first visit of foreign (British) journalists to Portugal for promotional reasons).

Influenced by the quality of the work developed by the SPP, and with a growing awareness of the potentialities of tourism, the Portuguese government decided in 1911 to establish the first official agency for tourism: the Repartição de Turismo¹¹ (RT). Based on the programme set up

¹¹ José de Ataíde was the first Portuguese governmental representative for tourism.

five years before by the SPP, the emphasis of the first official policy was also put on the improvement of hotel quality; on the creation of new roads; on promotion; and on the organisation of tourism resources.

It was also in the mid-1910s that the first planned resort was launched in Portugal (Estoril/Costa do Sol). The resort started to be built in 1914 by the French architect Henry Martinet. The project included a wide range of facilities, such as a new hotel, the recuperation of a local spa, beach facilities and a gambling area. Several similarities may be found between the way in which the Estoril resort was erected and the early days of tourism in England (see section 2.2.1). As in England, the plan which gave origin to the Estoril resort was also restricted to a physical project, regulating the spatial location of the equipment and infrastructure, and a rudimentary 'marketing strategy', i.e. some promotional campaigns (mostly brochures and advertisement in newspapers). In 1932 the Estoril resort had already attracted 2,500 international tourists, three times more than the total bednights spent together in the three most important hotels located in Lisbon (Avenida Palace, Metrópole and Europe).

As a result of the success achieved by the Estoril resort the Portuguese government entered then into a phase of enthusiasm and started to give strong support to tourism. The first funding scheme for tourism was launched in 1914 (Law 1121). Furthermore, and because of the Fatima miracle (revelation of the Virgin to three young shepherds on 13 May 1917), growing numbers of national and international visitors started to arrive in Fatima, and, thus, Fatima has become one of the most popular pilgrimage centres in Europe, and for which a plan was set up in the 1940s. The aim of the plan was twofold: to build a cathedral (whose construction was started in the early 1940s) and to control the fast development process in the surrounding area. The plan was implemented under the legislation created years before for the town planning field (1934 town planning legislation: 'Plano Geral de Urbanização - see section 5.2.1). Following the example of the Estoril resort the emphasis was also put on the spatial location of the equipment and infrastructure, i.e. on the physical control of the development process in the area (classic planning).

It was also in this golden phase of tourism expansion that the government decided to create the first decentralized tourism organisations in 1921 ('Comissões de Iniciativa' (CI)). The CIs were linked upwards to the RT, and became responsible for all tourism matters at local level (Law 1152). In 1934 there were already 83 CIs spread all around the country.

Among many other initiatives implemented in this first phase one may cite the following: legislation regulating (a growing number of) gambling areas (1927); creation of a tourism advisory agency to the government ('Conselho Nacional de Turismo' - 1929); establishment of

a national department for transport ('Junta Autónoma das Estradas' - 1927); and the creation of the first national airline responsible for operating schedule flights ('Serviços Aéreos Portugueses'¹² (SAP)' - 1927).

As a result of the policies implemented during this golden phase of Portuguese tourism several tourist areas, which represent the origin of modern Portuguese tourism, started to emerge in Portugal. The tourism development process in Portugal in the early 1930s was dominated by five main tourist destination areas: the Estoril resort was Portugal's most important tourist destination area, attracting visitors not only from Portugal but also from abroad; in the central part of Portugal there was Fatima, a growing pilgrimage centre, as well as Figueira da Foz, a beach and gambling resort demanded by nationals and Spanish; the two most important tourist resorts located in the northern region were Espinho and Póvoa de Varzim, two beaches resorts offering a wide range of gambling activities which were mostly demanded by nationals.

The period which followed this first golden age of Portuguese tourism was characterized by a U-turn in a number of policies set up before the 1930s. As described in section 5.2.1, 1926 was the year in which the dictatorship reached power. In addition to the socio-economic and political implications described before (see section 5.2.1), the dictatorship was also responsible for introducing a new orientation into the national tourism policy. To begin with, the RT was moved into the Ministry of Interior (MI), which was one of the most grey departments set up during the dictatorship. For instance, the MI was responsible for the supervision and coordination of the activities developed by the political police of the regime (PIDE¹³).

Although there are no written documents explaining why the RT was moved into the MI sphere, it is nevertheless believed that the reason for that was linked to the need to control nationals and foreigners travelling into and within the country (see Pina, 1988, p. 29). Particular support for that comes also from the rush in which the government decided in 1938 to pass legislation towards the movement of individuals within the country, when very few other pieces of tourism legislation were enacted during this period. That is, tourism was then viewed as an activity which could endanger the stability of the regime. In this regard, the government's policy went even further and in 1939 tourism became answerable to the prime minister (Salazar) (Law 30251), who decided to follow the steps undertaken in 1931 by Mussolini in Italy. In the early years of the dictatorship the paralysis of the tourism public

¹² The present flag carrier (TAP Air Portugal) was only launched in 1944.

¹³ PIDE (Policia Internacional de Defesa do Estado) - this police force was established to ensure the 'stability of the regime'. It was responsible for torturing a number of opposers to the regime, and received the condemnation of the Amnesty International.

sector was almost total, as documented by the first and second 'Planos de Fomento' (1953-1964), in which no reference whatsoever was made to tourism.

At local level the tourism organisation was also subject to great changes. During 1936 the government decided to move the coordination of the local tourism organisations (Comissões de Iniciativa) from the RT to the direct responsibility of the municipalities. The Comissões de Iniciativa were then extinct and replaced by 'Comissões Municipais de Turismo' and 'Juntas de Turismo' (Decree-Law 27424) (a situation which has remained unchanged up to now). However, because the municipalities had already lost their economic and administrative autonomy (see section 5.2.1), and also because most municipalities were faced with scarce resources, the tourism sector was then thrown right to the bottom of the priorities of local government.

Despite the efforts made by the government to control the expansion of tourism, what, nevertheless, happened during World War II was precisely the opposite. Indeed, as a result of its neutrality many foreigners, most of them refugees, started to arrive in Portugal, and a number of foreign children were even adopted by Portuguese families. The influx of tourists also did not stop after the war, with thousands of people returning to Portugal to visit the places where they found refuge during the war.

Increasingly aware of the importance of tourism upon the balance-of-payments and with growing costs brought about by the war in the colonies (see section 5.2.1), the Portuguese government decided then in the middle 1960s to release part of its tight control over tourism, principally because some of the policies previously set up had proved inefficient: year after year the number of international arrivals were steadily increasing in Portugal.

For the first time during the dictatorship the 'Planos de Fomento', launched between 1965-67 and 1968-72, made reference to the potential of tourism in Portugal. With the expansion of tourism in a number of northern European countries during the 1960s (see section 2.3.2); the construction of three airports in Portugal (Lisbon in 1942; Oporto in 1945 and Faro in 1965); and the improvement of the accessibility by road to the south of Portugal (e.g. construction of the April 25 bridge across the Tagus), massive numbers of international tourists started to arrive.

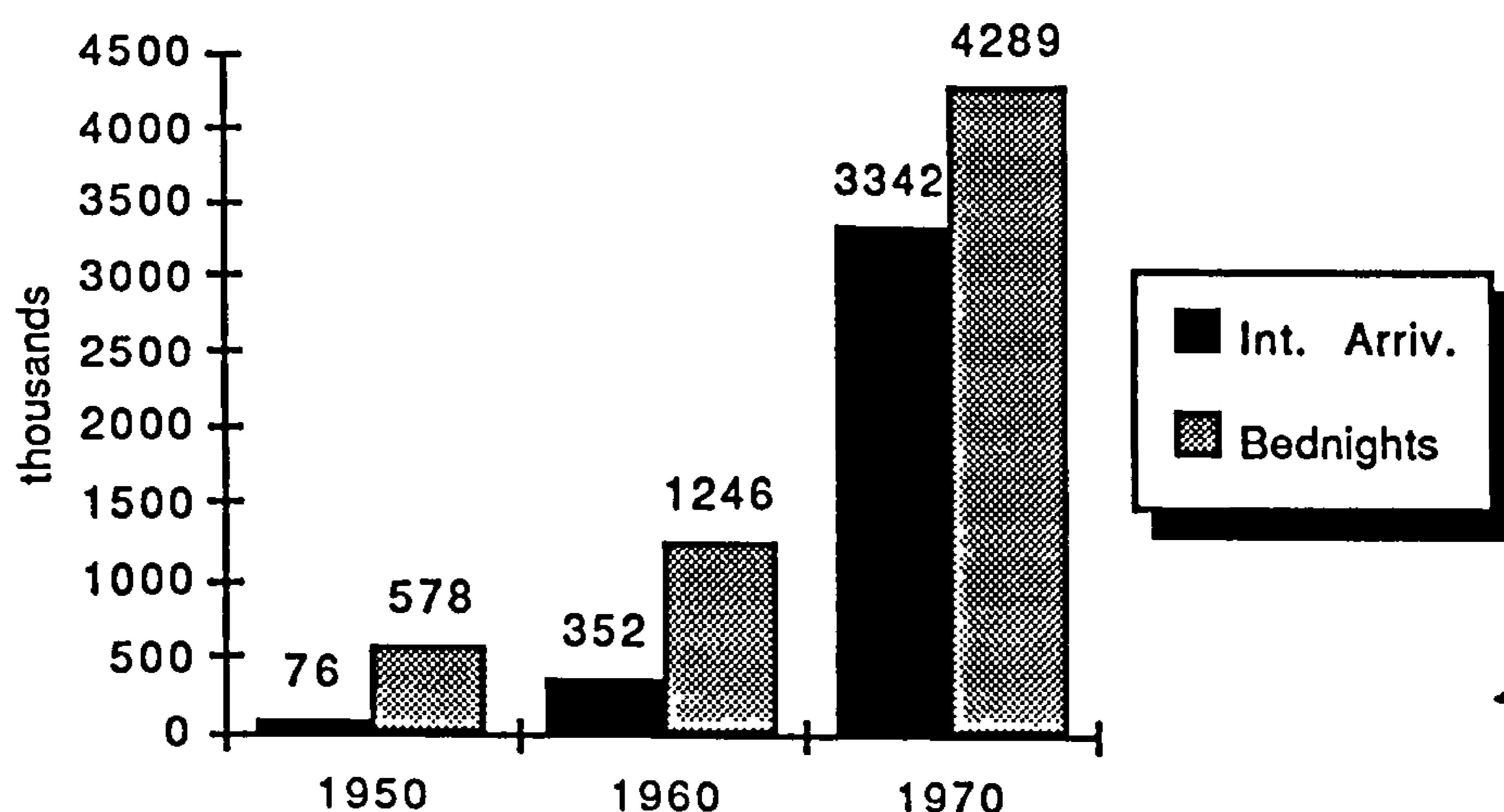
In addition to these major improvement of the infrastructure and equipment a profound restructuring was also introduced between 1956 and 1958 into the organisation and structure of the tourism sector by Marcello Caetano, a 'liberal' within the regime and also an enthusiast of tourism, who later in 1968 assumed the position of prime ministre after the death of Salazar.

His enthusiasm for the tourism sector is well reported in the IV 'Plano de Fomento' (1974-79), ended in 1974 by the revolution, in which tourism assumed the role of 'strategic sector'.

Among the most important reforms introduced by Marcello Caetano (1956 - 1958), one may cite the following: the creation of the first Portuguese RTBs, whose activities were supervised at national level by the RT/Ministry of Interior; the establishment of the first hotel-schools in Portugal, which later in 1965 originated the establishment of the National Institute for Tourism Training; the establishment of an agency specializing in tourism funding (Tourism Fund); new legislation regulating the functioning of the hotel industry, travel agencies, rent-a-car, camping, and gambling; etc. In addition to these policies, the first natural park was launched in the 1960s (Peneda Gerês); in 1962 the Switz Kurt Krapf was invited by the government to set up a national strategy for the tourism sector; and 1969 was the year in which, for the first time, tourism statistics started to be published in Portugal.

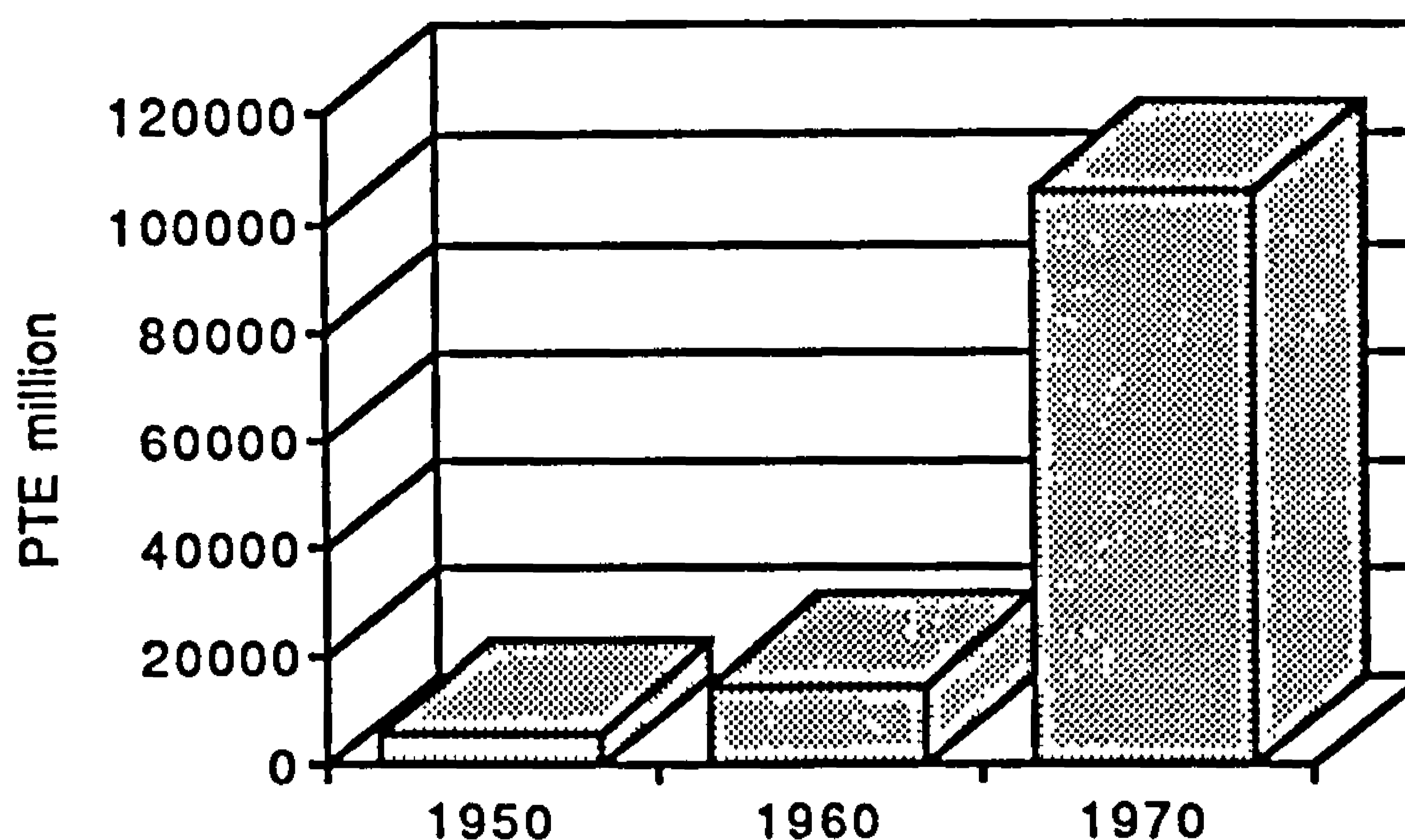
The rapid expansion of tourism after the 1950s is illustrated by figure 5.1 where it can be seen that between 1950-60 the number of international arrivals and bednights rose by 363% and 116% respectively. However, a even more rapid expansion was observed during the 1960s, since the number of arrivals and bednights increased by 850% and 244% respectively. That is, whereas between 1950 and 1970 the number of tourist arrivals in the world increased by 556% (see table 2.1), in the same period tourism expanded in Portugal by 4,297%. A similar situation is also observed in terms of receipts because between 1950 and 1970 the world's tourism receipts rose by 752% (table 2.1) while in Portugal they increased by 1,572% (figure 5.2).

Figure 5.1 - International arrivals and bednights in Portugal (1950-70)



Source: INE (s/y); Pina (1988)

Figure 5.2 - Tourism receipts in Portugal (1950-70)



Source: INE (s/y); Pina (1988)

The rapid expansion of tourism in Portugal between the 1950s and 1960s (and onwards) was due to the development of a new tourist region - the Algarve. The Algarve region was first 'discovered' in the world's market by the British during the 1920s. Due to its special beauty, Praia da Rocha became then the most popular resort among the British, for whom the first golf course was built in 1927. Up to World War II the Algarve continued attracting large numbers of (mainly) British, many of them lured by a growing literature published in Britain describing the outstanding climate, scenery, and local hospitality¹⁴. However, during World War II most international flows to the Algarve stopped. It was only in the 1960s, with improvement of the Portuguese road infrastructure to the south (e.g., April 25 bridge) and the construction of an airport (Faro international airport), that tourism was again launched in the region.

Aware of the impact that tourism could produce in the region a first (physical) planning strategy was set up in 1965, at the very beginning of its development process. The plan, designed by the Italian Luigi Dodi, constituted a practical response to the government's willingness to start supporting the tourism sector in Portugal, as stated in the 1965-67 Plano de Fomento, as well as a reaction to the impact which the new local airport could produce in the region (Faro international airport - 1965). It is even nowadays argued (see the Portuguese National Tourism Plan 1986-89 (PNT, 1986)) that the plan set up by Dodi was of great quality, principally when considering the lack of data and qualified staff in the tourism field in the mid-1960s.

¹⁴ Pina (1988, p. 223) argues that, as far as it is known, the first books published in London about the Algarve are due to John Gibbons ('A foot in Portugal' (1931) and 'Playtime in Portugal - An unconventional guide to the Algarves' (1936)).

Carlos Ramos, one of the architects responsible for the Portuguese National Tourism Plan (1986-89), argues that 'taking into account the limitations in which it was produced, Dodi's plan represents a remarkable achievement for Portuguese town planning and in particular for Portuguese tourism planning. Some of the most important weaknesses of the plan were linked to the lack of data and surveys then available in the region, the reason why some of its forecasts failed. However, it should be pointed out that only 20 years later the Portuguese government was able to set up another plan (National Tourism Plan) of a similar quality to Dodi's (see section 5.3.2.7). Even nowadays the plan represents an important reference for the Algarve tourism development process' (Carlos Ramos, in PNT, 1986, translated).

Despite the opposition of the nine local 'Comissões Municipais de Turismo' and 'Juntas de Turismo' later in 1970 the first RTB was established in the Algarve (DL 114/70), which sought to create a framework capable of supporting the preparation of regional policies. It is stated in the legislation that established the Algarve RTB that 'the tourism development process in the Algarve demanded a new structure which could provide the framework for the preparation of regional policies and avoid fragmented actions' (DL 114/70, preâmbulo, translated).

For the five initial years of operation the Algarve RTB was charged with the responsibility of implementing a vast PTE 5 billion¹⁵ (£20 million) infrastructure and equipment plan set up by the Ministry of Construction (Ministério das Obras Públicas). According to Pina (1988, p. 225) in the first five years of operation the activities developed by the Algarve RTB were completely oriented towards the implementation of this plan. Only since 1975 the RTB has started to devote a good share of its activities to marketing and promotion.

That is, in opposition to several unplanned developments put forward in neighbouring Spain and in other tourist destination areas in their early stages of development (see section 2.3.2), Dodi's plan, and the planning emphasis placed on the initial years of operation of the Algarve RTB, illustrate how planning matters assumed centre-stage in the development process of the Algarve in its early days of tourism development. This may be seen among the reasons why it is argued in literature that the tourism products offered in the Algarve show a higher quality when compared to those offered in Spain (Boniface and Cooper, 1994, p. 131).

Despite the favourable evolution of the tourism process of the 1960s, the mid-1970s were, nevertheless, dominated by a number of events with important consequences for Portugal. In the late 1960s Salazar died and was replaced by Marcello Caetano, a 'liberal' within the regime; then growing pressure started rising from the radicals of the regime against some signs of

¹⁵ 1988 prices (£ 1 = PTE 250)

relaxation within the government. It was also in the late 1960s/early 1970s that the war in the former colonies started to assume greater proportions. With a growing internal opposition headed by communists and socialists; the international condemnation of the acts perpetrated by the regime both in the mainland and in the colonies; and the world's economic instability produced by the first major oil crisis of the early 1970s; then, and only after 48 years of dictatorship, the regime was finally overthrown by a military coup in the early hours of the 25th of April 1974, in which, by accident, only one man was killed, the reason why the Portuguese label their revolution as 'a quiet revolution'.

5.3.2 Tourism after the 1974 April Revolution

In the turmoil of the 1974 Revolution the Portuguese government was controlled by left wing politicians. Influenced by communist ideals and based on the argument that some economic groups had been responsible for sustaining the dictatorship, the government then decided to nationalize a number of institutions. Cements, banks, insurance, oil, transport, electricity, paper meal, large rural properties, etc, were nationalized. The establishment of a central planning system, with the characteristics discussed before in section 1.5, was among the objectives of some radicals.

In the tourism sector several hotels, restaurants and travel agencies were also nationalized, and, on account of that, the government decided in 1976 to establish a new organisation (ENATUR) responsible for the planning and management of these companies (DL 662/76, 4/08) (for an expanded analysis see section 5.3.2.5.2).

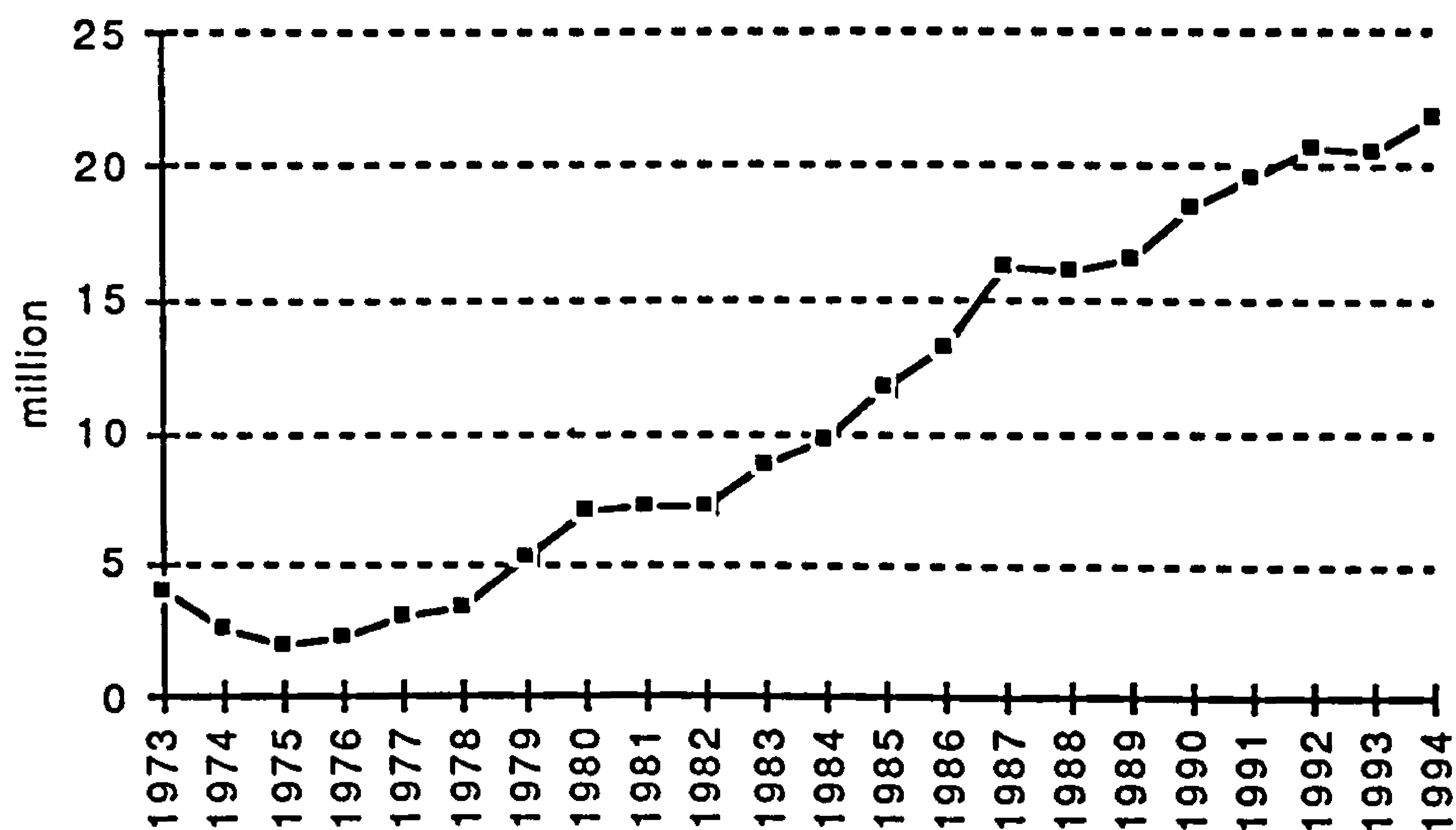
As the post-revolution turbulence gradually started to settle down, and with the realization of the first free elections in 1976, a new social and economic cycle was started in Portugal. As far as tourism is concerned it might be said that twenty years after the new cycle commenced, many things have changed while some others have remained untouched. The following sections attempt to show that despite the favourable evolution of international tourism and the improvements brought into the tourism planning system, many things are yet to be done. In particular, few modifications were introduced into the organisational framework which dates from the 1930s and 1950s (see section 5.3.2.5); the excessive load of tourism in some few areas of the territory is still a big issue which must be tackled in future (see section 5.3.2.3); the benefits that have been brought to Portugal by mass tourist developments have also to be questioned (see section 5.3.2.4); the attempts made by the government to expand domestic tourism have not yet produced significant practical results (see section 5.3.2.2); and, finally,

the policies implemented during the last fifteen years must be continued in future (see section 5.3.2.7). These are the issues which are discussed in the following sections.

5.3.2.1 International tourism

It is shown by figure 5.3 how sensitive the tourism sector is to political crisis and social instability. As a result of the revolution the number of international arrivals in Portugal dropped by 37% between 1973-74, from 4.1 million to 2.6 million. However, because of the absence of a bloodshed, social and political stability rapidly returned to the country. Hence, the arrival of international visitors started to grow steadily again. In 1978 international arrivals reached 3.5 million and since then they have never stopped growing, having reached 20 million visitors in 1992. The expansion of international arrivals has been marked by an increase both in terms of tourists and excursionists (figure 5.4).

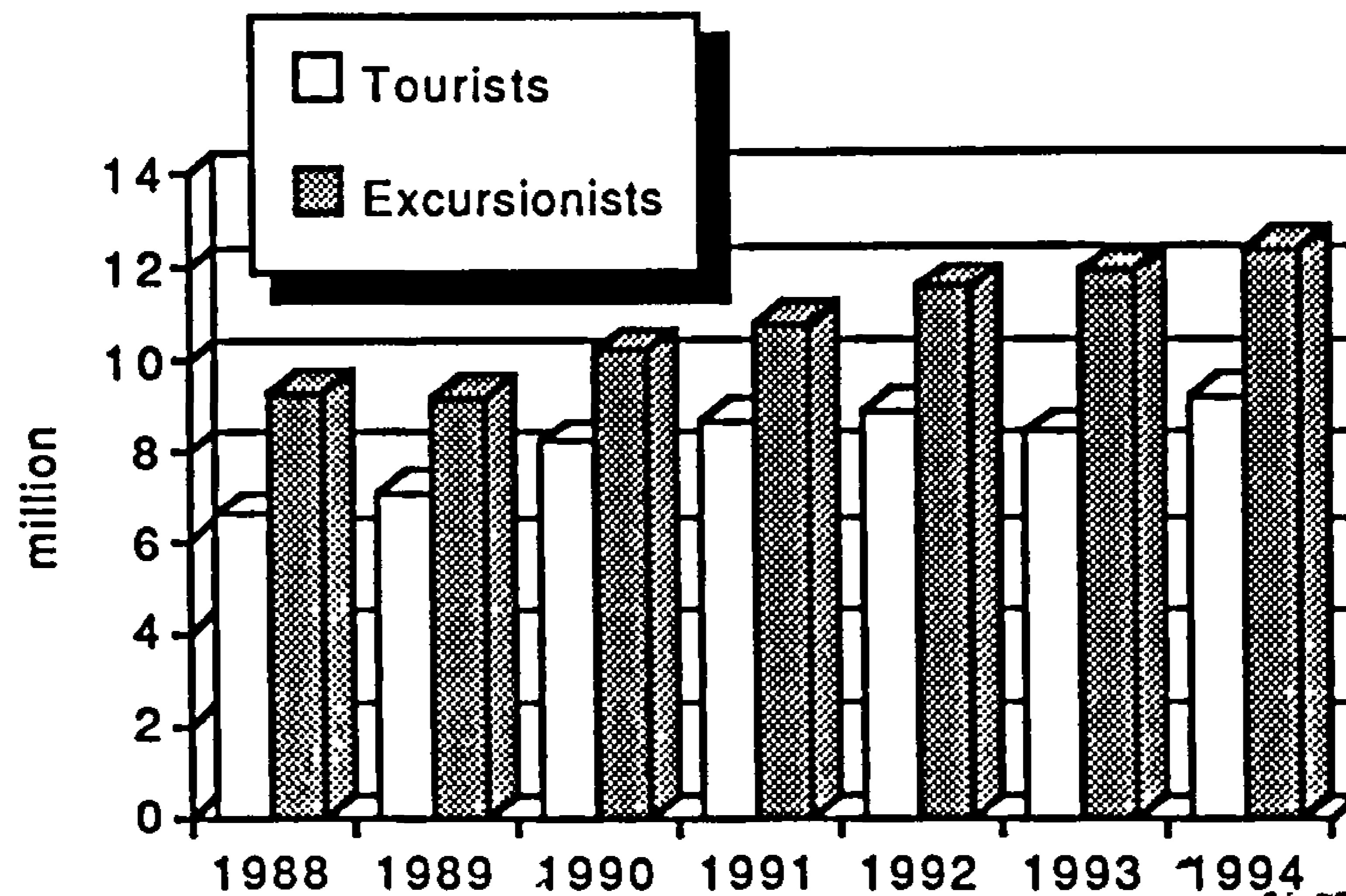
Figure 5.3 - International arrivals in Portugal (1973-94)



Sources: DGT (1996a, p. 181; 1989; p. xv), INE (1994; p. 25)

Despite the growing numbers of international arrivals Portuguese tourism is faced with an excessive dependence on some particular markets (see figure 5.5). Spain alone accounts for 56% of the total international tourism, the UK being the second largest generating country (16%), followed by Germany (10%) and France (7%). These four countries alone account for 89% of the total tourism arrivals in Portugal. In terms of bednights the situation is similar since

Figure 5.4 - Arrivals of tourists and excursionists in Portugal (1988-94)



Source: DGT (1996a, p. 73); INE (1994; p. 25)

only 5 countries (the UK (23%), Spain (22%), Germany (16%), Holland (9%), and France (9%)), account for about 80% of the Portuguese tourism (DGT, 1996, p. 84).

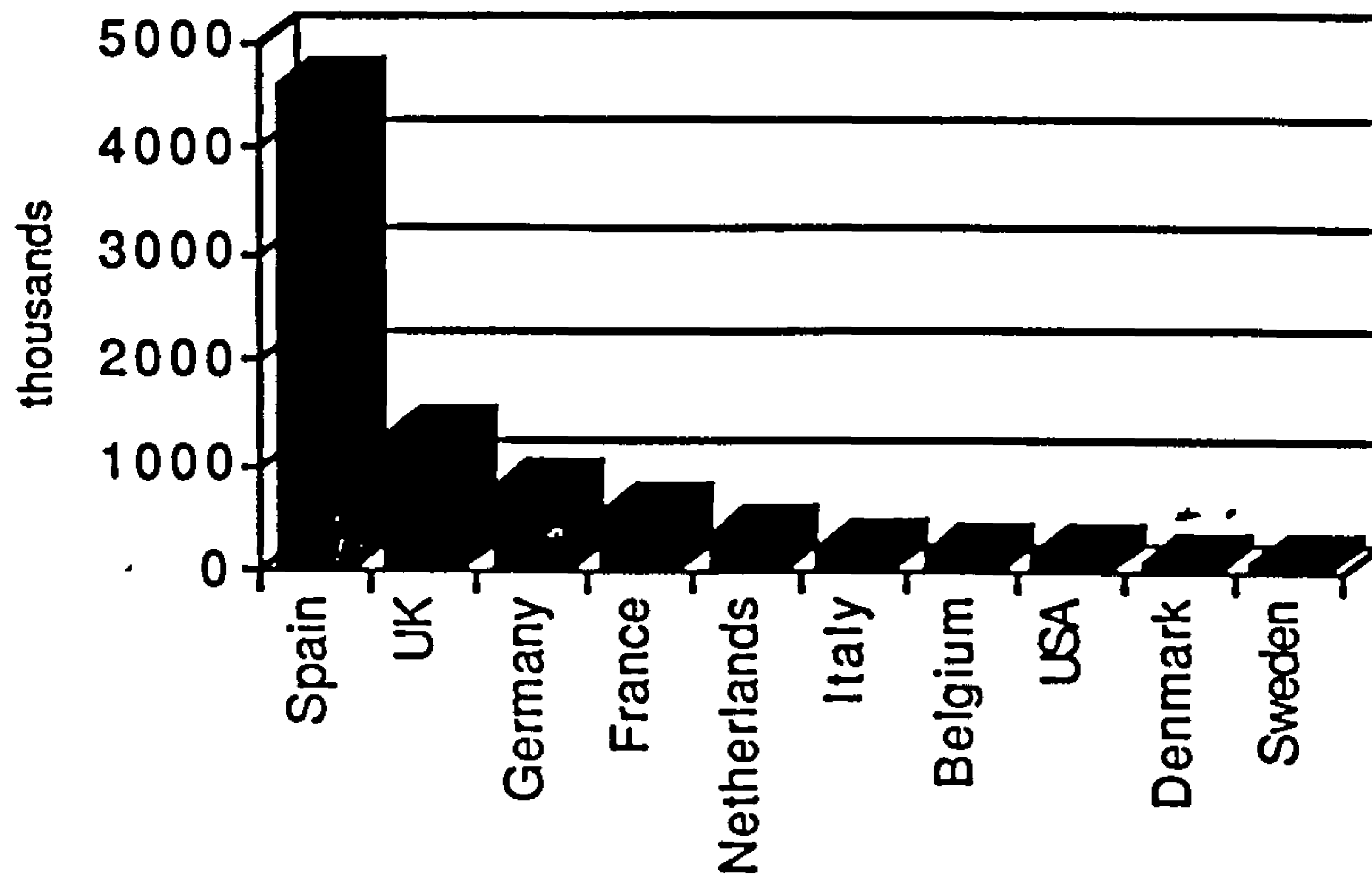
When viewed from a regional perspective the problem is slightly better in most regions (see tables 5.1a and 5.1b). However, the excessive dependence on some few markets is again an issue in the most popular Portuguese destination area (the Algarve) (see section 5.3.2.3).

Indeed 46% of the international flows to the region have origin in Britain. As a result of that, every time Britain enters in recession, such as in the early 1990s, the Algarve tourism also enters into crisis. Because of this it is usual to say in Portugal that 'every time Britain sneezes the Algarve tourism gets a cold' (for an expanded analysis see section 5.3.2.3).

In addition to the dependence on some few markets international tourism is also excessively linked to 'sun-sea-sand' products (figure 5.6), because Portugal offers a diversity of beaches, ranging from the Algarve Mediterranean warm beaches to the cooler white long sand beaches located in the western part of the country (for an expanded analysis see section 5.3.2.3). For this reason, 'holidays' are the most popular factor which attracts international tourists to Portugal (92.3%). Religion and business account for less than 4% of the international market.

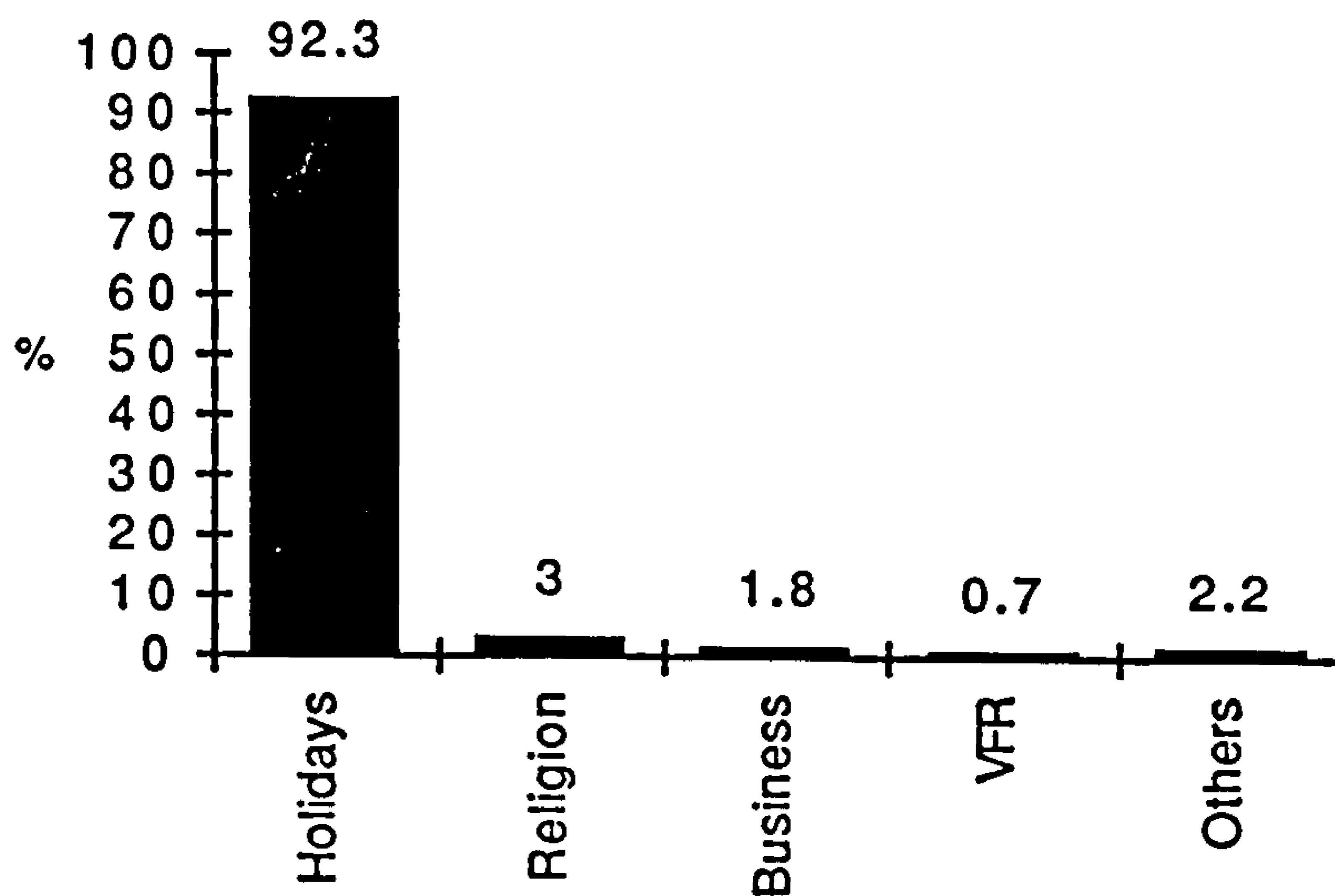
As a result of this Portuguese tourism demonstrates strong seasonal fluctuations (figure 5.7), since most arrivals take place in the high season between July and September (37%).

Figure 5.5 - Portugal's top 10 tourism generating countries (1994)



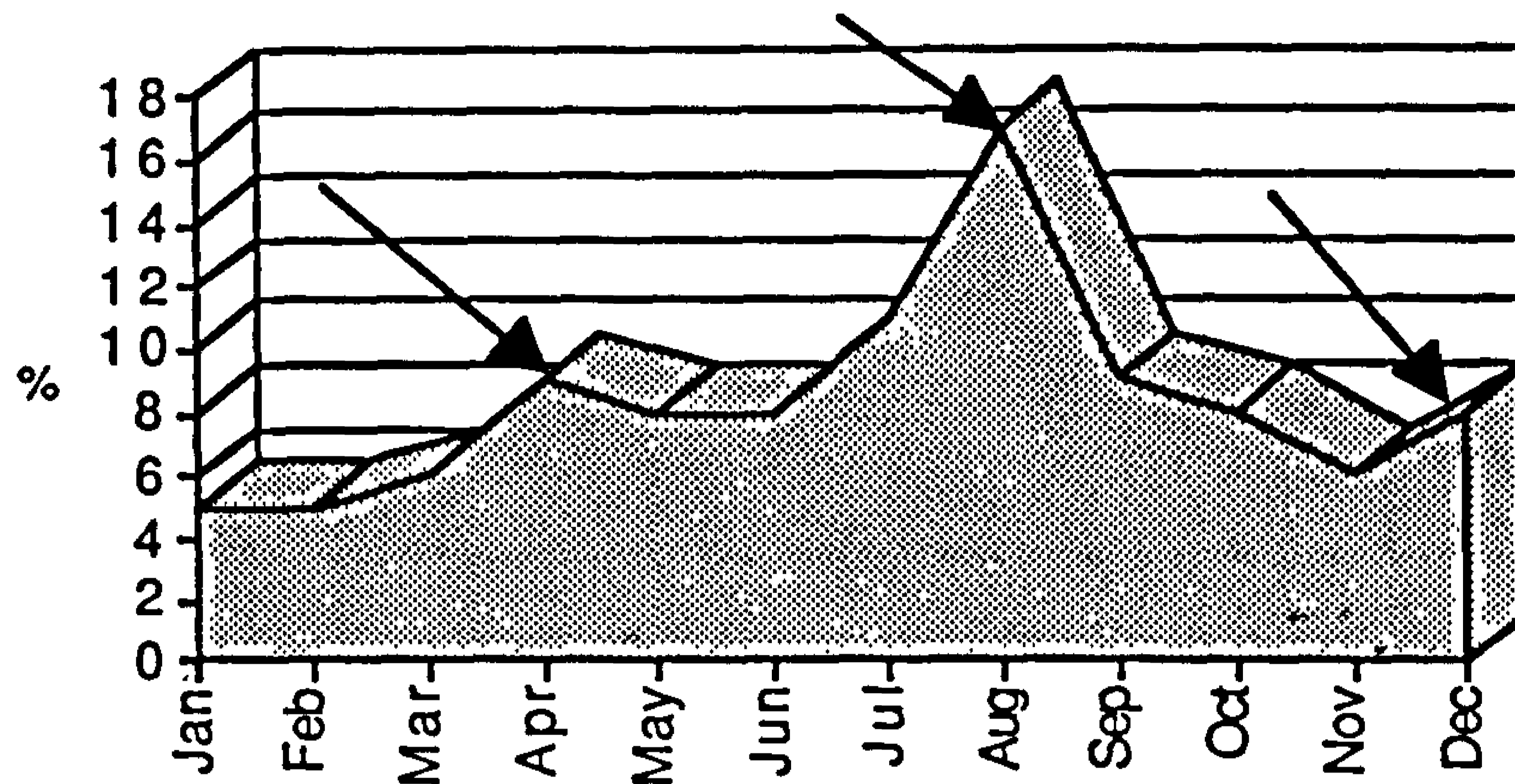
Source: DGT (1996a; p. 74)

Figure 5.6 - Motivation of visitors travelling to Portugal (1994)



Source: DGT (1996a)

Figure 5.7 - International arrivals in Portugal by month (1994)

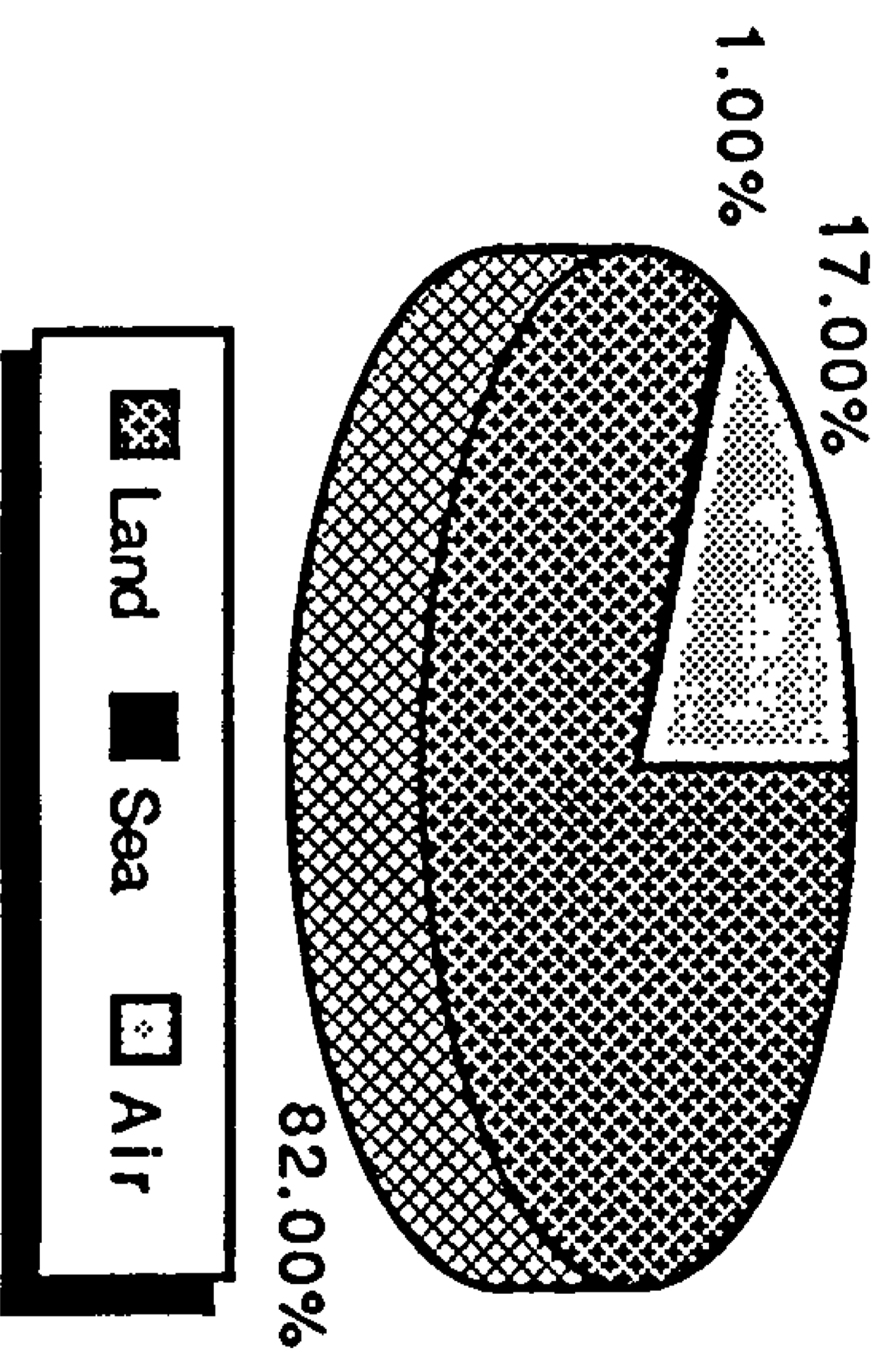


Source: DGT (1996a); INE (1994; p. 43)

Nevertheless, significant numbers of international tourists also arrive in other periods of the year. For instance, the Easter (April) and Christmas (December) vacations, which account for 9% and 8% respectively of Portugal's annual international arrivals, are also important periods for the Portuguese hospitality industry. Overall, the mid season, between April and June, is also important period for Portuguese tourism, because 25% of the international trips to Portugal take place during this period.

The excessive dependence of Portuguese international tourism on some few markets and products, as well as its seasonal fluctuation, are viewed by the national government as a problem that must be solved in future. The strategies launched under the National Tourism Plan (1986-89) have attempted to improve this situation, though their practical effects have not yet been noticed (see section 5.3.2.7). However, there are clear signs that several policies launched during the recent past have already produced positive results. For instance, 53.2% of the international arrivals in 1979 used to take place by land. However, with the rapid improvement of the accessibility to Spain, through the construction of a number of roads (e.g., IP5 linking central Portugal to central Spain; 'Via do Infante' linking Algarve and the south of Spain), and bridges (e.g. the new bridge across the Guadiana (Algarve), and new bridges linking the north of Portugal to Galicia), the number of arrivals by land is now 82% (see figure 5.8).

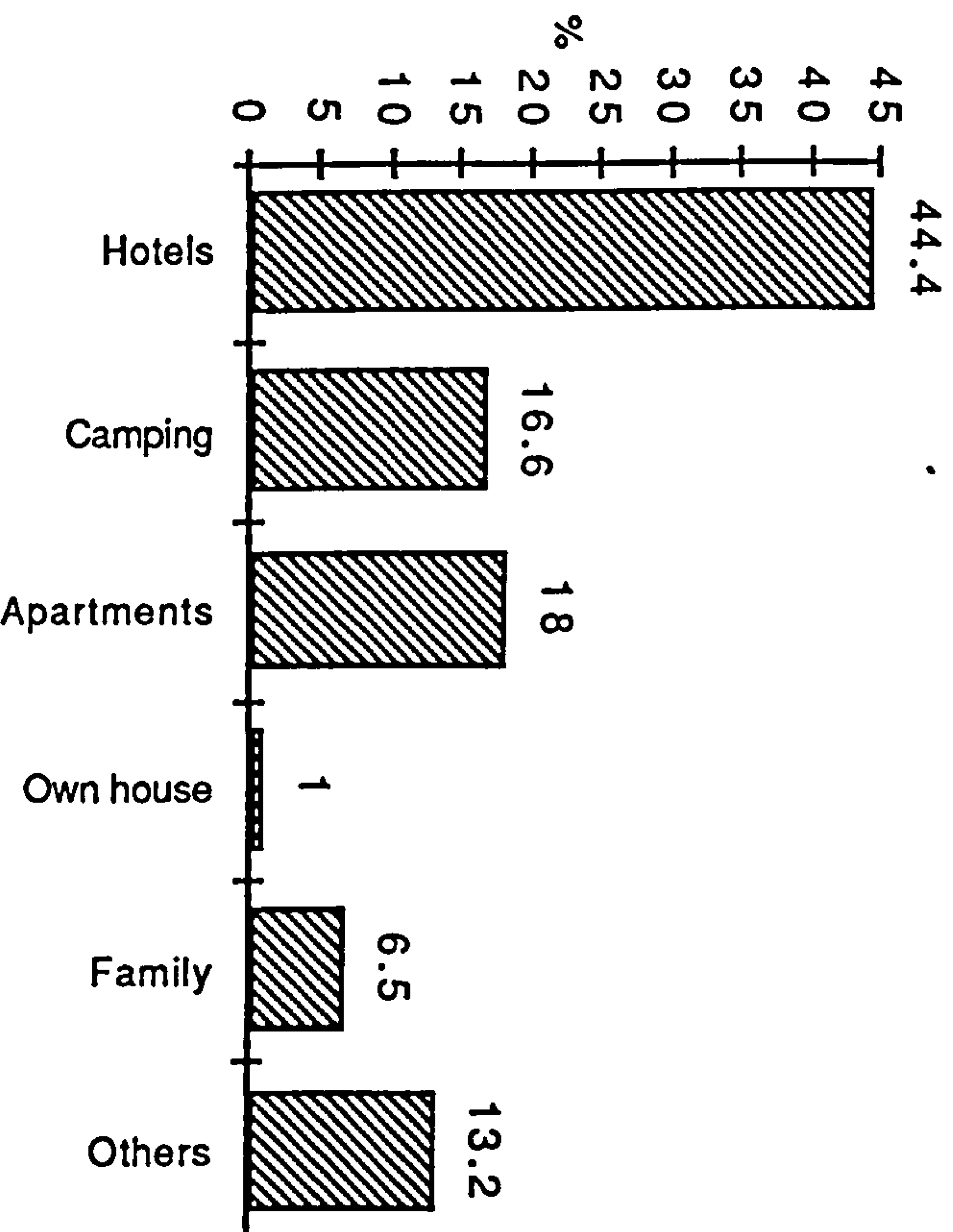
Figure 5.8 - Tourist arrivals in Portugal by way of transport (1994)



Source: DGT (1996a, p. 67)

Several new hotels were also built with the aim of attracting the upper-level tourist markets. For instance, under a funding scheme launched in the late 1980s the government decided to give priority to the construction of high grade hotels and, as a result of that, several high quality hotels were then constructed. In the mid-1990s over 44% of the international tourist overnights take place in hotels (figure 5.9). As will be seen in section 5.3.2.4 this situation is particularly

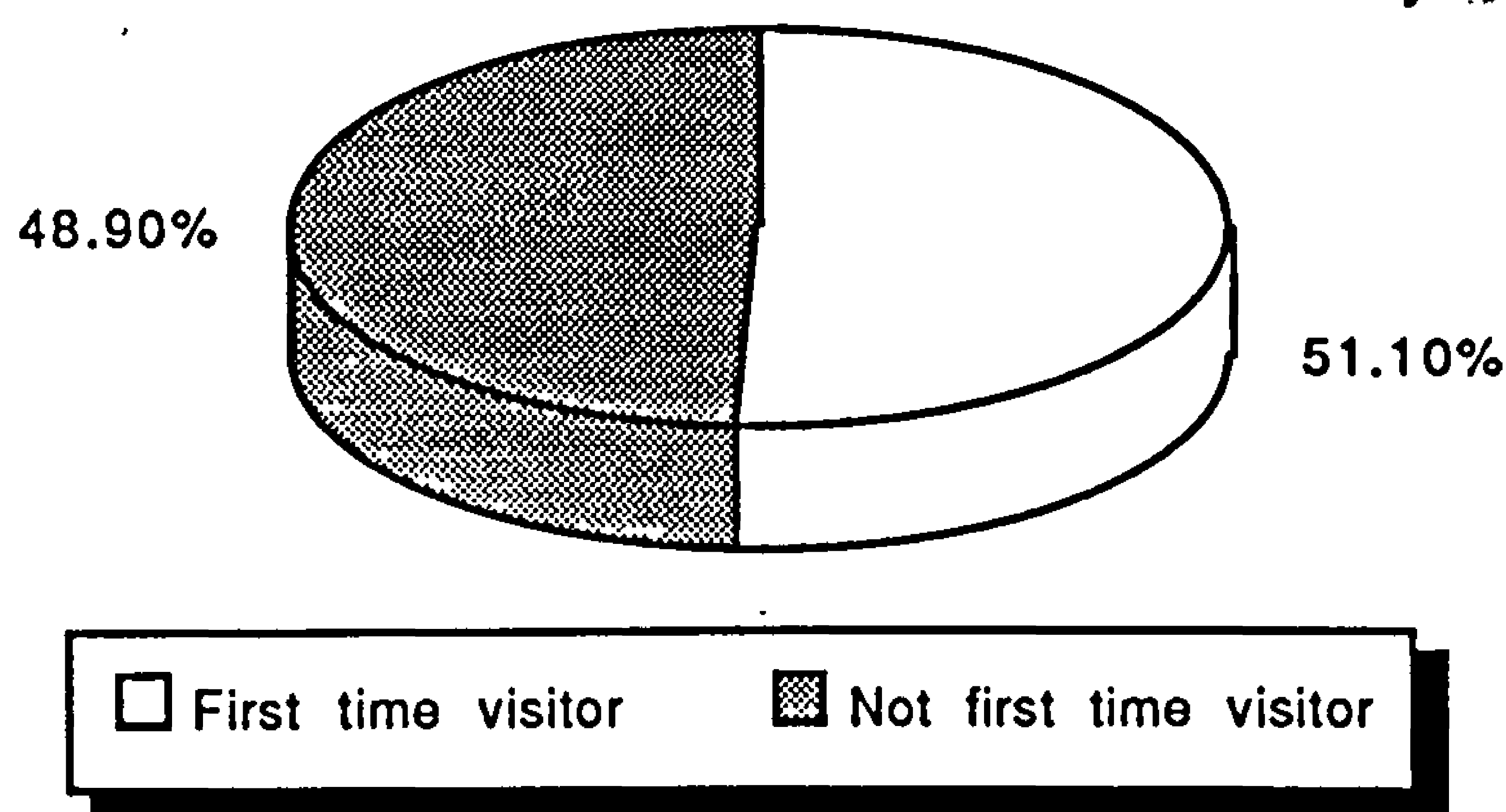
Figure 5.9 - Type of accommodation chosen by international tourists (1994)



Source: DGT (1996a, 1989)

important since research conducted in Portugal has proved that the multiplier effect created by the hotel industry (1.684) is above the average of the multiplier effect produced by the whole Portuguese tourism industry (1.5). Finally, the reasonable standards of quality offered by the Portuguese tourism (see section 5.3.1) has attracted growing numbers of second trips to Portugal (figure 5.10). This is another matter that has been targeted in a number of national policies and for which practical results may already be observed.

Figure 5.10 - Loyalty of the visitors travelling to Portugal (1994)



Source: DGT (1996a, 1989)

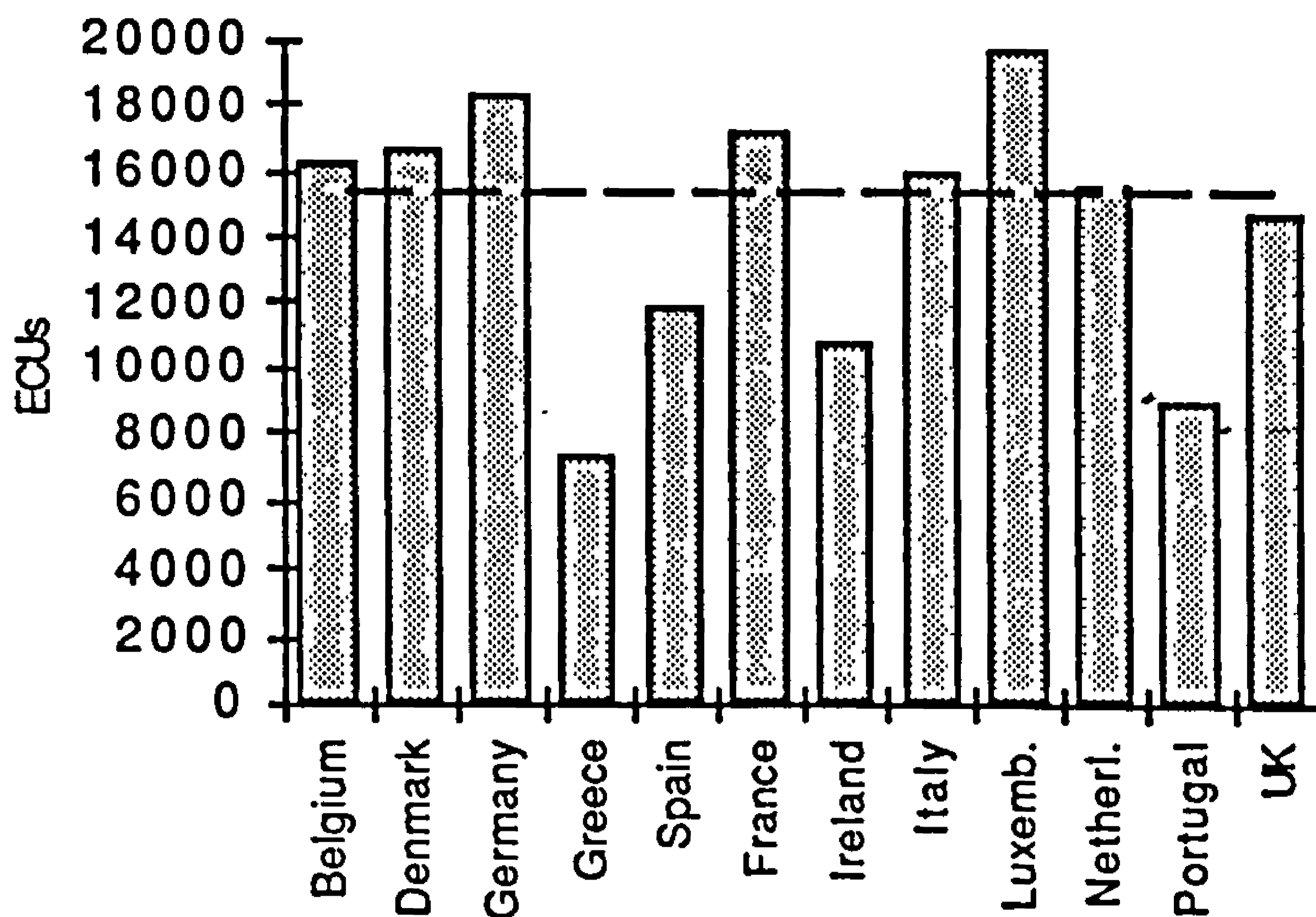
5.3.2.2 Domestic tourism

As discussed in chapter one (section 1.3) and chapter two (section 2.2.2), the expansion of tourism is linked to the improvement of socio-economic conditions. That is, people tend to spend larger sums of money (disposable income) on self-enhancement needs when other basic necessities (e.g., food, housing, health care, etc) are fulfilled (see in particular Maslow's model - figure 2.1). Since World War II living standards have started to improve very rapidly in most Northern European countries. As a result of better salaries, less working hours and larger amounts of extra income, larger sums of disposable income have started to be spent on the travel and tourism markets.

However, living standards are not the same all around the world. Portugal is still the second poorest country within the EU, since its GDP per capita amounts to about ECU 9,064, which represents 59% of the average GDP of the 12 EU countries (Eurostat, 1993; p.42) (see figure

5.11). Not surprisingly, the great share of the income of the Portuguese is spent on basic needs such as housing, health care, education, etc.

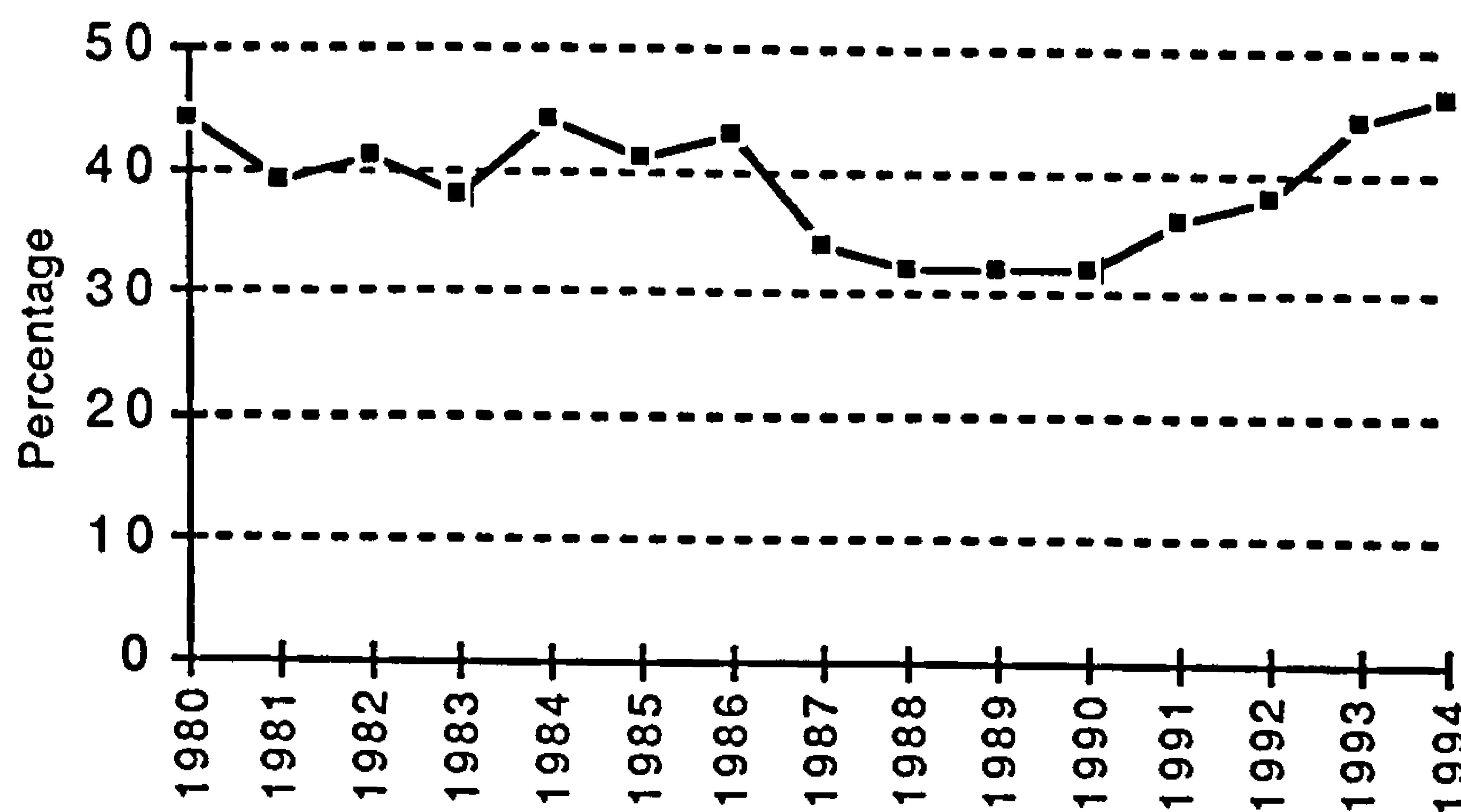
Figure 5.11 - GDP per head at market prices in the 12 EU countries (1991)



Source: Eurostat (1993; p. 42)

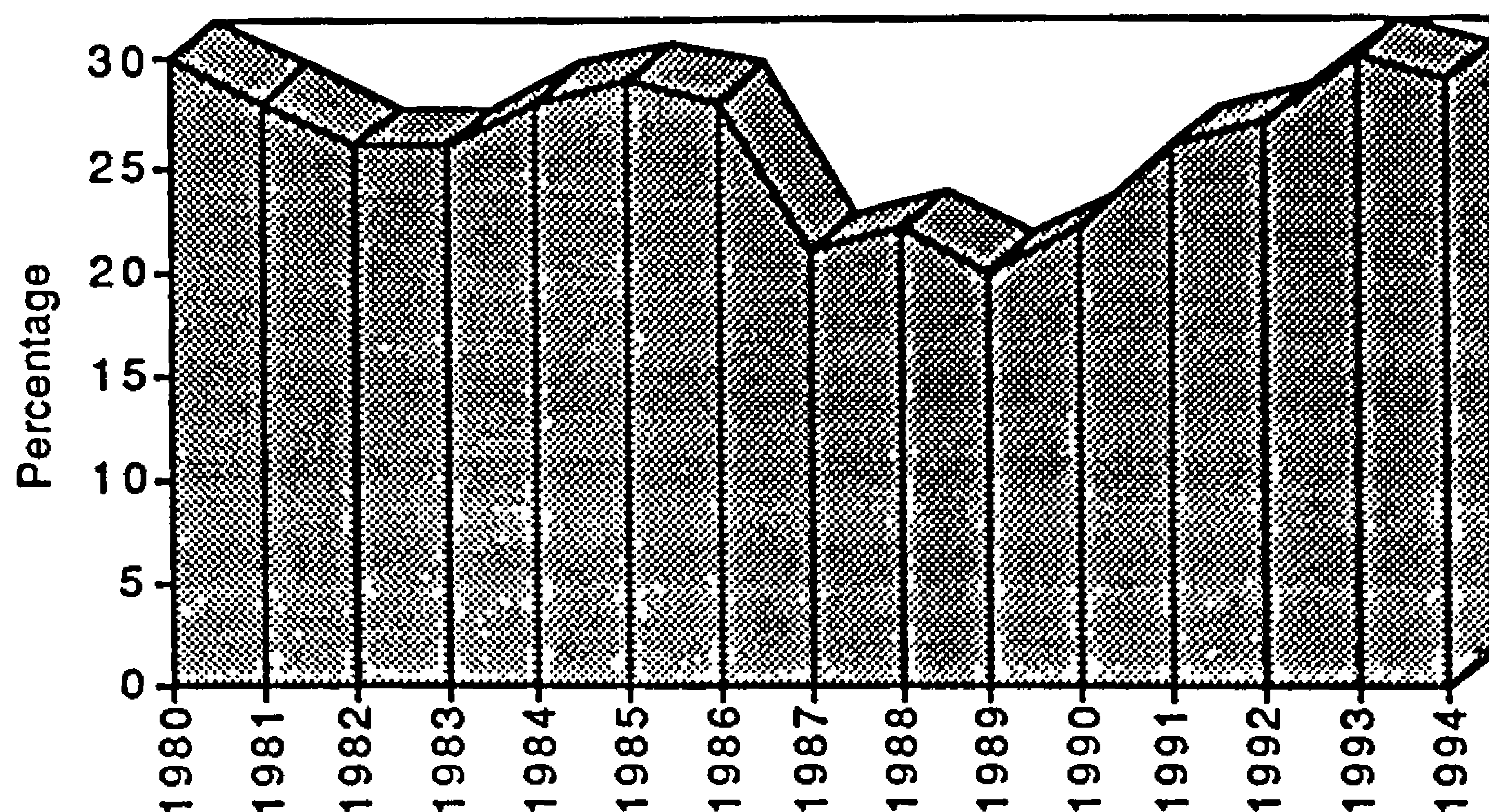
Bearing that in mind, it is also not surprising to observe that only few Portuguese have holidays. Nevertheless, figure 5.12 illustrates that strong variations may be noticed between 1980 and 1994. For instance whereas in the late 1980s only 32% of the population used to

Figure 5.12 - Share of the Portuguese who spend holidays (1980-94)



Source: DGT (1995; p. 5)

Figure 5.13 - Share of the Portuguese who leave their usual place of residence to spend holidays (1980-1994)



Source: DGT (1995; p. 5)

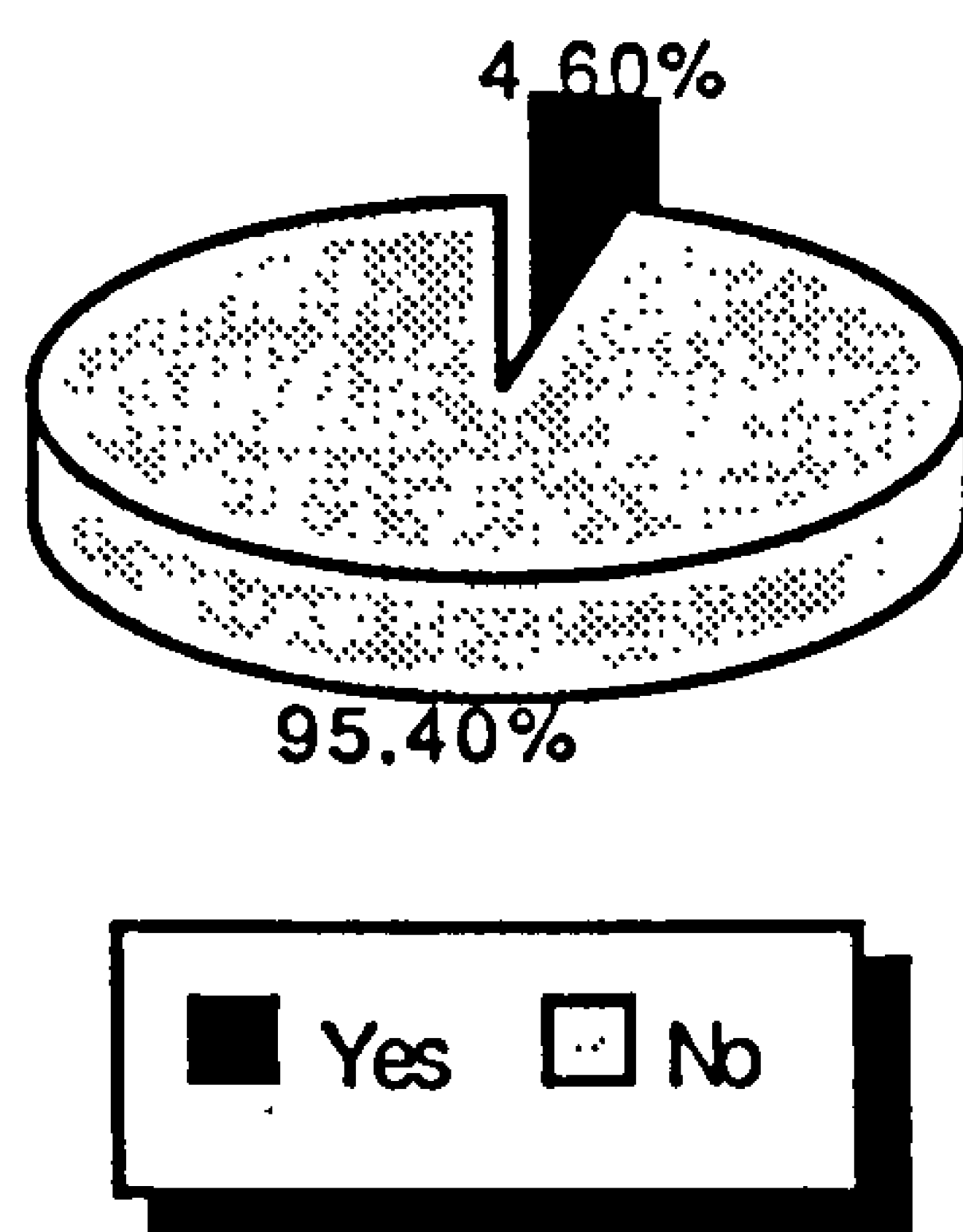
spend holidays (3.14 million people) in the mid-1990s this share rose to 46% (4.51 million people), which is about the same percentage of people who used to spend holidays in the early 1980s.

Besides, the 4.51 million Portuguese who enjoyed holidays in 1994, 71% stayed in their usual place of residence because they could not afford to pay for a flat or any other form of tourism accommodation away from the place where they reside. Figure 5.13 also shows that the number of Portuguese who have moved to different accommodation to spend holidays went rapidly down between the mid-1980s and the late 1980s, having however increased since then up to the mid-1990s.

Furthermore, it is noticed that few Portuguese can afford to spend holidays abroad. As illustrated by figure 5.14 only 4.6% of the population went abroad on their holidays in 1994, whereas 70% of the Germans aged 14 and over usually take their holidays outside the country (Pearce, 1992, p. 71). In addition to the low salaries paid in Portugal, the Portuguese also have to take into account more expensive living costs abroad as well as travelling costs which are still too expensive for the vast majority of the population¹⁶.

¹⁶ The minimum wage in Portugal is of about £200 per month, which is almost the price of a return flight between Portugal and England.

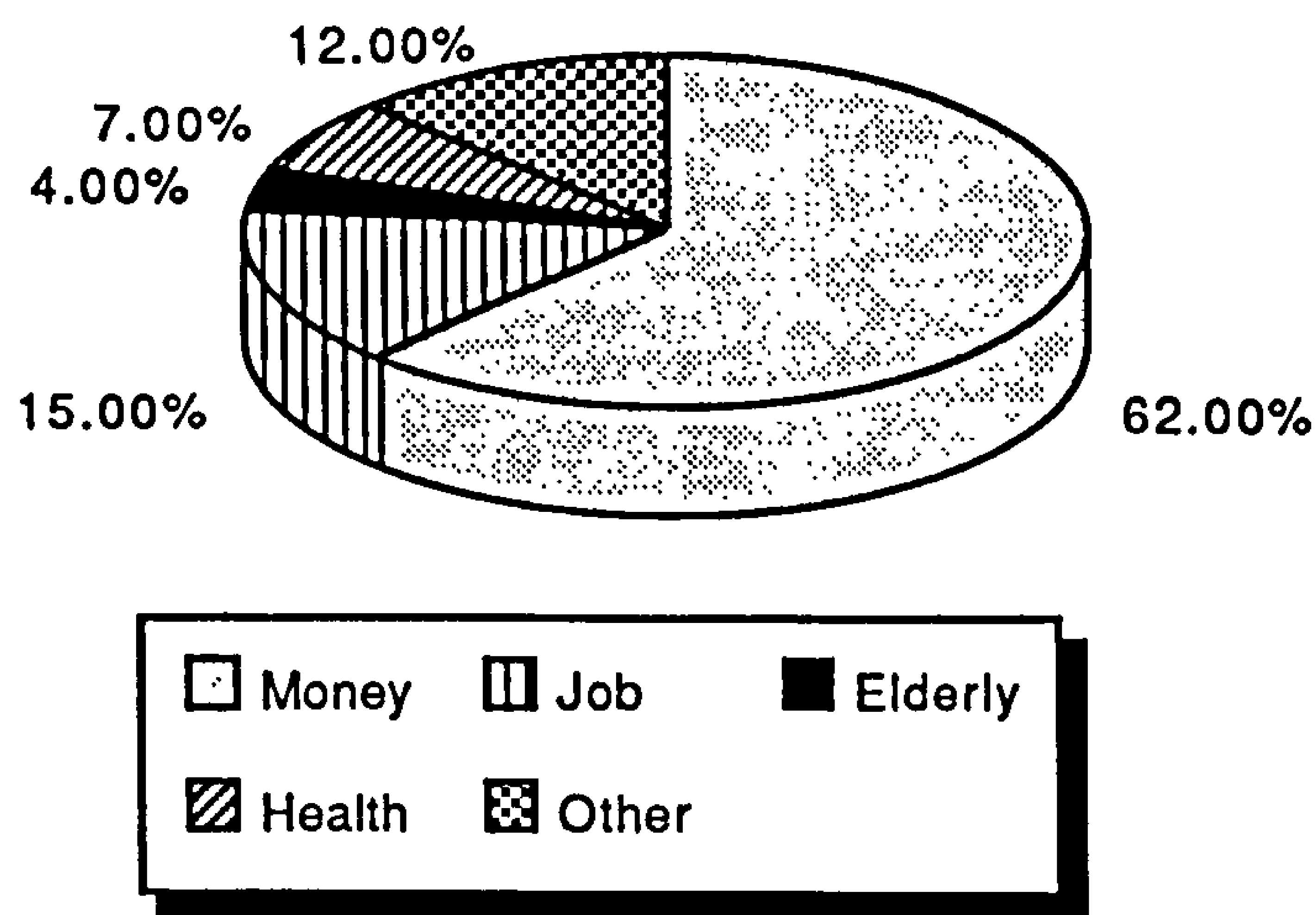
Figure 5.14 - Share of the Portuguese who spend holidays abroad (1994)



Source: DGT (1995; p. 7)

Figure 5.15 summarizes the reasons why most of the Portuguese population do not spend holidays. As illustrated by the chart 62% do not take holidays for economic reasons (6.08 million), while 15% are not released from their jobs (1.47 million); also a group of 11% of the population do not enjoy holidays either because they are elderly or for health reasons (1.06 million).

Figure 5.15 - Reason why the Portuguese do not take holidays (1994)



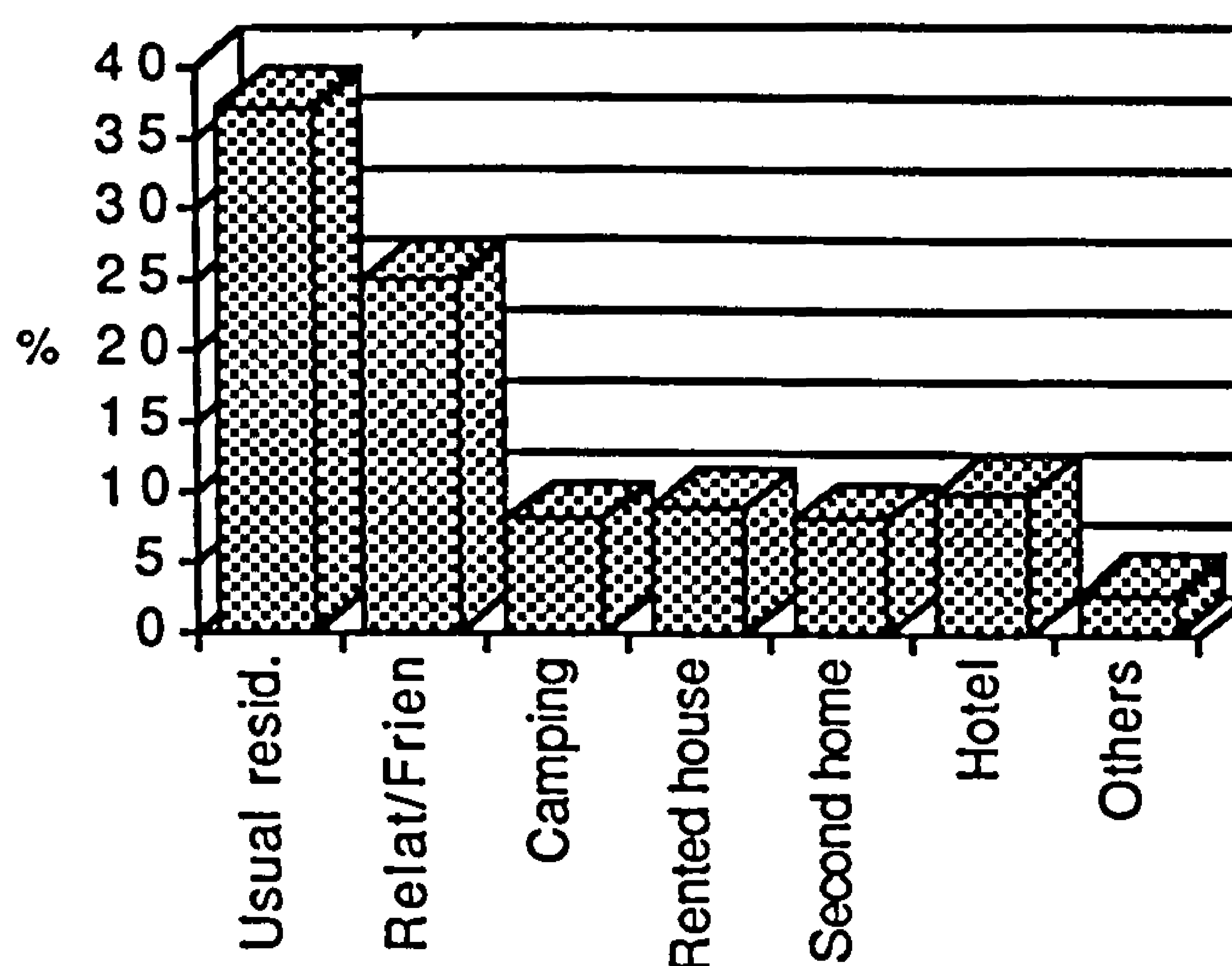
Source: DGT (1995; p. 11)

Following Boniface's and Cooper's definitions (Boniface and Cooper, 1994; pp. 9-16) one may conclude that though the 'actual' or 'effective' demand in Portugal is restricted to a few 4.51 million individuals (46%), it is nevertheless noticed that there is much room for domestic tourism to expand, since about 95% would be willing to do it in future if the present restraining conditions were overcome; i.e. the 'suppressed demand' in Portugal amounts to about 4.76 million people.

Most of the reasons discussed before about the economic problems faced by the Portuguese with regard to spending holidays also help to explain the characteristics of the holidays taken by the share of 46% of the Portuguese who take holidays (i.e., 4.51 million people).

First of all, it is observed that during their holiday time 37% of the population who take holidays stay at home relaxing, going to the nearest beaches, etc (see figure 5.16), while a share of 25% prefer to move to the house of friends and relatives. Despite that, there is a portion of 9% of the population who rent accommodation in the place where the holidays take place. Camping, an alternative cheap way of spending holidays, is used for by 360,640 Portuguese (8%), representing that the same share of the Portuguese who have already bought a second accommodation for their holidays. Finally, it is observed that less than half a million people spend holidays in tourism accommodation (10%).

Figure 5.16 - Type of accommodation chosen by the Portuguese to spend their holidays (1994)

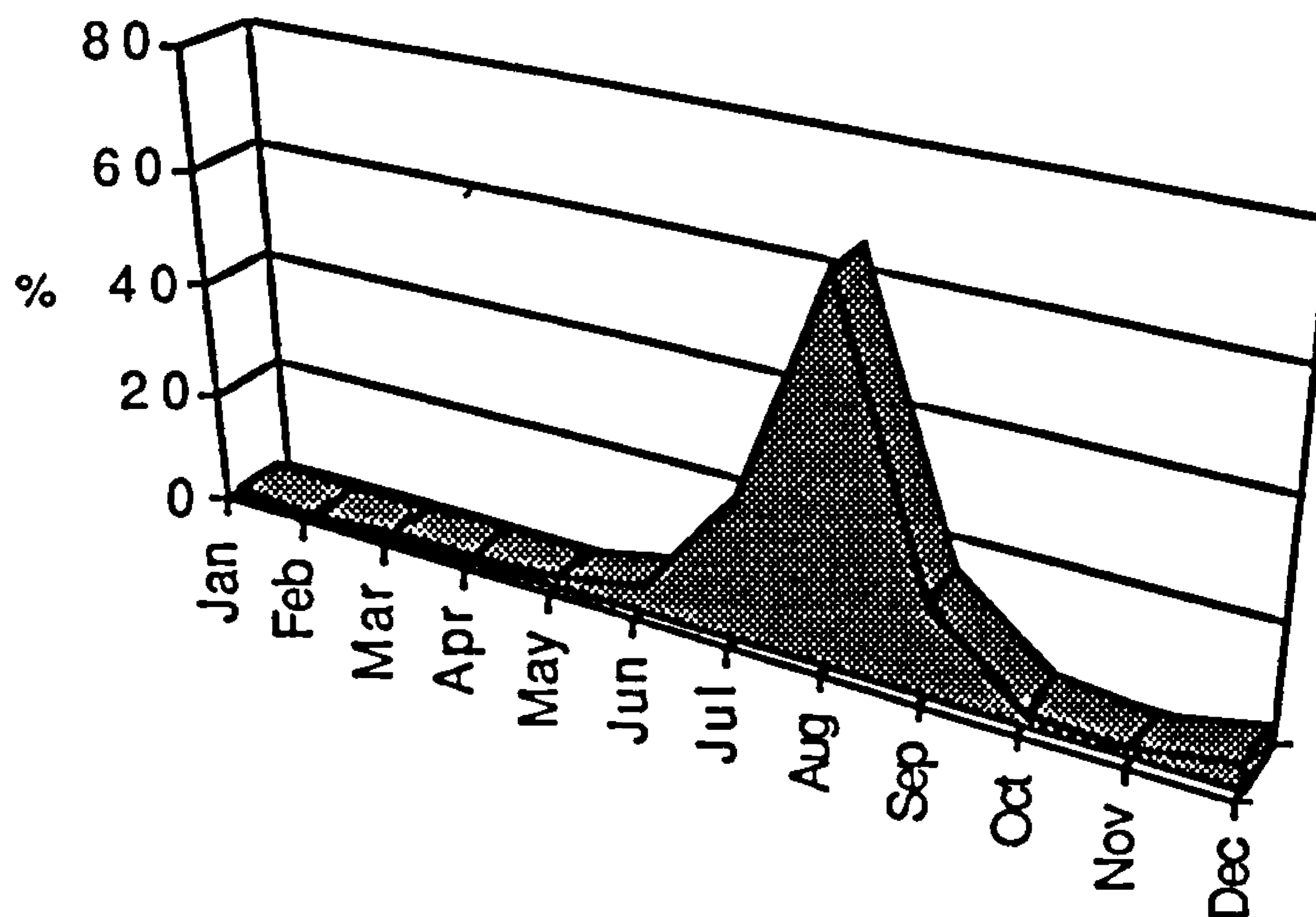


Source: DGT (1995; p. 34)

The favourite holiday season of the Portuguese is undoubtedly summer (figure 5.17). Indeed, it is between July and September that about 95% of the Portuguese decide to take holidays, with the aim of enjoying the warm summer temperature. Besides, summer is the period in which all schools close for the holidays, and, as a result of that, most parents keep their holidays for the high season seeking to stay for longer periods with their children.

It is also illustrated by figure 5.17 that very few Portuguese spend holidays between January and May because winter sports (e.g., skiing) are not popular in Portugal. Because of the lack of snow Portugal offers only one place available for skiing (Serra da Estrela), but most of the equipment and infrastructure offered locally are very poor (for an expanded analysis see section 5.3.2.3). It is nevertheless noticed that some of the Portuguese spend holidays in the mid season, either in June or between October and December. Most of the Portuguese who spend holidays in December do it to enjoy the Christmas break close to friends and relatives. The remaining share of people who spend holidays in the mid/low season (June, October, November) tend to do it for several reasons, such as lower prices, to avoid crowds, or even because some companies do not close for holidays and, therefore, the employees have to split their holidays into different periods of the year.

Figure 5.17 - Seasonal distribution of the holidays of the Portuguese (1994)

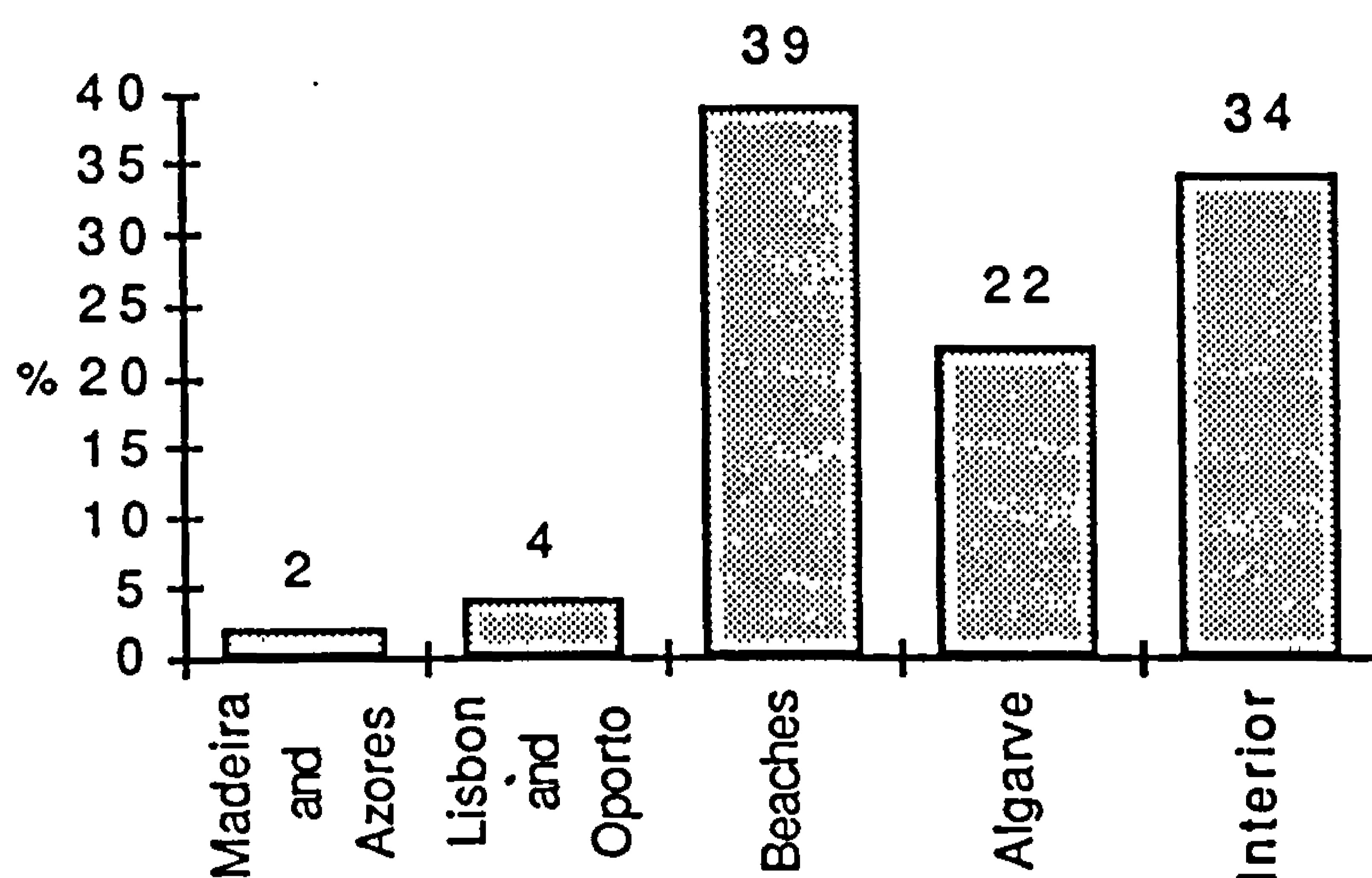


Source: DGT (1995; p. 15)

Taking into account that most of the Portuguese population take holidays in the high season, it is not difficult to guess what their favourite destination areas are. As illustrated by figure 5.18,

the vast majority of the Portuguese spend their holidays on the beaches of the western part of Portugal or in the Algarve (61%) (see also section 5.3.2.3). Only a few 4% decide to visit the two most important Portuguese cities (Lisbon and Oporto). Cavaco (1995) points out that an earlier wave of first generation outmigrant urban working class tourists has been replaced by a new wave of middle class rural tourists. There are also increasing numbers of people who decide to travel to the Portuguese interior looking for natural areas, extensive woodlands, fine scenery, and the unspoiled life-styles which are disappearing in the economically more developed littoral area. The Portuguese interior is already responsible for attracting a share of 34% of the Portuguese preferences (including those who live in the area and cannot afford to spend holidays in other places), and it is likely that this market will expand in future (for an expanded analysis see section 5.3.2.3).

Figure 5.18 - Places where the Portuguese spend holidays (1994)



Source: DGT (1995; pp. 23-31)

5.3.2.3 Tourism supply and spatial distribution of tourist flows

The two above sections provide an overview of the characteristics of international and domestic tourism in Portugal (sections 5.3.2.1 and 5.3.2.2). It was shown that the 'sun-sea-sand' market dominates the Portuguese tourism panorama both in terms of international and domestic tourism. However, and despite its relatively small size, Portugal offers a diversity of tourism products which makes the country an attractive and promising tourist destination area. It is the aim of this section to provide an expanded analysis of the characteristics of the tourism products offered by Portugal, as well as to discuss the excessive load of tourist flows in some few parts of the territory.

The tourism products offered in (mainland) Portugal may be categorized into six main groups (see map 5.5)¹⁷: the Green Coast ('Costa Verde'), the Silver Coast ('Costa de Prata'), the Lisbon Coast ('Costa de Lisboa'), the Mountains ('Montanhas'), the Valleys (Planícies'), and the Algarve. These regions are used in Portugal both for promotional actions undertaken abroad by the ICEP¹⁸ (the reason why they are labelled as promotional regions), and for statistical purposes (e.g., data collected by the Portuguese National Institute of Statistics (INE) and the General Directorate for Tourism (DGT)).

The tourism activity in the southern part of Portugal (the Algarve) is dominated by the 'sun-sea-sand' market (see table 5.1.b) (for an expanded analysis see DGT, 1993a). The Algarve region entered the world's market in the mid-1960s (see section 5.2.1), and since then large resorts have been built along its coastline, some of them assuming forms of ribbon developments. The Algarve has become one of the world's most popular tourist destinations, the reason why 81% of the local bednights are sold to foreigners (mainly British, German and Dutch). Tourism has also become the most important economic activity in the region, having already overtaken other important sectors, such as agriculture and fishing.

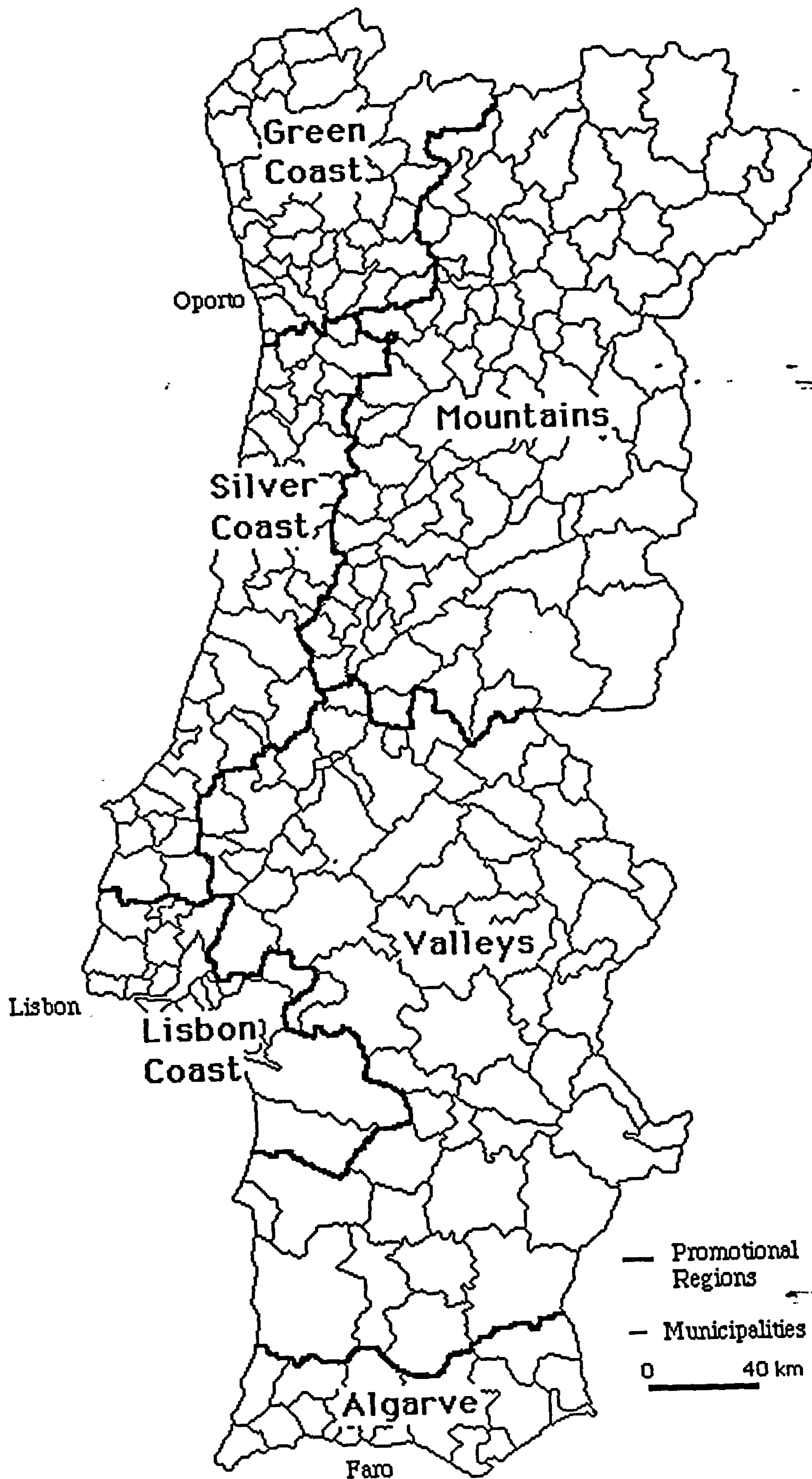
The importance of tourism in the Algarve may also be illustrated by the size of its RTB, the largest tourism board in Portugal, which manages a budget of about £6 million. In terms of tourism in Portugal the Algarve accounts for 45% of the total bednights; 35% of the total rooms; and 29% of the total working population employed in tourism (see figures 5.19 and 5.20).

The second most important Portuguese tourism area is the Lisbon Coast (see table 5.1.a) (for an expanded analysis see DGT, 1993b). In the early days of tourism in Portugal the Lisbon Coast, and in particular the Estoril resort, was the most important Portuguese tourist area (see section 5.2.1) The tourism sector in the Lisbon Coast has been dominated by Lisbon, the capital, the Estoril resort, and Troia, a beach tourism area located in the south margin of the

¹⁷ In addition to the six promotional regions located in the mainland, there are also two other promotional regions in Portugal: the islands of Madeira and the Azores. Due to their administrative and economic autonomy the structure of the tourism organisation in these two islands is different of those located in mainland Portugal. Taking also into account their distance from the mainland, it became difficult to include them in this research. Despite that, and whenever appropriate, reference is made to the characteristics of the tourism sector in these two islands.

¹⁸ ICEP (Investimentos, Comércio e Turismo) - agency responsible for tourism promotion abroad (see section 5.3.2.5.2).

Map 5.5 - The Portuguese Promotional Regions



Tagus river in the Setúbal district (see map 5.3). Though the 'sun-sea-sand' market prevails in the region, the tourism sector also depends on business activities (linked to the capital), gambling (there is a large casino located in the Estoril resort), as well as on a number of other activities, such as city tourism (linked to the capital), racing (the Portuguese Grand Prix takes place in Estoril), conferences (there is a number of conference centres in the Lisbon Coast), golf (there are several golf courses in the outskirts of Lisbon), etc.

Most tourists travelling to the Lisbon Coast are foreigners (66%), being Spanish, British and German the most important markets from abroad. This region accounts for 20% of the total bednights; 22% of the total tourism beds; and 26% of the total working population employed in the tourism sector (see figures 5.19 ad 5.20). Due to the economic importance of tourism in the region most of the local RTBs (and Tourism 'Juntas') are of medium size, managing budgets of about £1.5 million.

Taking into account the Algarve and the Lisbon Coast together it can be seen how spatially localized Portuguese tourism is, since in spite of comprising about 10% of the Portuguese mainland area, they represent alone 65% of the bednights, 57% of the rooms, and 55% of the working population employed in tourism.

The third most important tourist destination area in Portugal is the Green Coast (see table 5.1.a) (for an expanded analysis see DGT, 1993c). This region is yet in its early days of development, and despite the growing importance of international tourism, which represents 42% of the total bednights, tourism is essentially a domestic activity (58% of bednights) (see figures 5.19 and 5.20). Although as yet unknown in the international market, there are clear signs that tourism may expand in future.

Indeed, the Green Coast region offers a wide range of products for which demand is growing very rapidly worldwide (e.g., rural tourism (see Cavaco, 1995), cultural tourism, natural tourism (e.g. Peneda-Gerês national park), unspoiled life-styles, pilgrimage (there are a number of traditional religious events principally in the summer period), typical festivities, gastronomy, fine wines, etc). From abroad come principally the Spanish, who account for 27% of the international tourism in the region. As a result of the improvement of the accessibility to the north of Spain, and due to a number of cultural similarities with the neighbouring Galicia, the Spanish excursionist is also a very important source of visitors to the region. Owing to the low level of tourism development, the two local RTBs are small, dealing with annual budgets of about £0.6 million.

The Silver Coast is the fourth most important tourist destination area in mainland Portugal (see table 5.1.a) (for an expanded analysis see DGT, 1993d). The name of the region comes from its long white sand beaches which are located in the western part of Portugal. The 'sun-sea-sand' market is, thus, the most important source of tourism in the region. However, the Silver Coast also offers a number of other products, such as religious tourism (e.g. Fatima Sanctuary - see section 5.3.1); fine scenarios, wines and gastronomy; natural parks (e.g., Peniche and Ria de Aveiro); etc. In addition to that this region coincides with the most developed part of Portugal (littoral), and therefore the Silver Coast benefits from excellent accessibility, which has made it particularly attractive for domestic tourism flows (56% of bednights). At present the region comprises 11% of Portugal's tourism rooms, 6% of the total tourism bednights and employs 8% of the staff employed in tourism (see figures 5.19 and 5.20). As a result of its low level of tourism development, there are several small RTBs within the region, whose annual budget amounts to about £0.6 million.

Taking together the Algarve, the Lisbon Coast, the Green Coast and the Silver Coast, one may observe that these four regions alone comprehend 79% of the bednights; 80% of the rooms; and 75% of the staff employed in tourism. In terms of the mainland, i.e. excluding Madeira and Azores, these four regions represent 93% of the bednights, 89% of the rooms and 89% of the jobs. That is, tourism in Portugal is geographically concentrated in few regions and is also strongly tied to coastal areas ('sun-sea-sand' market) (see also Rosa Pires and Costa, 1992).

As a result of its geographic location inland areas, i.e. Mountains and Valleys, are responsible for attracting a very small share of tourism. The promotional region of Mountains accounts for 5% of the Portuguese mainland bednights as well as for 6% of the total jobs and 7% of the total rooms (see figures 5.19 and 5.20). The Valleys region has also made a small contribution to Portuguese tourism, since it comprehends 2% of the total bednights, 4% of the rooms, and 5% of the jobs (see figures 5.19 and 5.20). The geographic location of these two regions and their bad accessibility have prevented a more rapid expansion of the tourism sector.

Despite these shortcomings both the Valleys and the Mountains regions offer a great potential for tourism. For instance, in the Valleys region there are some unspoiled beaches, whose demand has increased very rapidly over recent years. As agriculture has become bankrupt in the Alentejo area (Valleys), tourism is viewed as an alternative for stimulating development. The recuperation of typical villages and the creation of hunting areas are amongst the projects which, over the recent past, have attracted several national and international investors (for an expanded analysis see DGT, 1993f).

Table 5.1a - Characteristics of tourism in the Portuguese promotional regions (Green Coast, Silver Coast, and Lisbon Coast)

	Green Coast	Silver Coast	Lisbon Coast
Location	North	Central-North	Central-South
Climate	Atlantic	Atlantic	Atlantic
Economic structure	Mainly agriculture and small industry	Agriculture but also large industry and services	Services and large industry
Share of the national tourism in bednights (excluding the Madeira and Azores islands)	9%	7%	24%
Stage of development	Involv./Development	Involv./Development	Regeneration
Tourist density	Not crowded	Not crowded	Slightly crowded
Life style	Small/medium towns Few foreign influences	Small/medium towns Few foreign influences	Within the influence of a large metropolitan area (Lisbon) Some foreign influences
Visitors	Mainly excursionists	Mainly excursionists	Mix of tourists and excursionists
Ratio tourism bednights Portuguese/Foreigners (%)	58/42	56/44	34/66
Main foreign markets (bednights)	Spain (27%) Germany (12%) France (11%) UK (9%) Italy (7%)	Spain (29%) France (17%) Italy (13%) Germany (10%) UK (5%)	Spain (20%) UK (12%) Germany (10%) USA (8%) France (8%)
Tourism products	Emerging (and diversified) forms of tourism: beach, rural, ecological, mountains, spas, pilgrimage, gastronomy, etc	Emerging (and diversified) forms of tourism: beach, ecological, gastronomy, etc	Diversified: business, city, beach, gambling, golf, racing, etc.
Travel characteristics	Largely Independent Tour	Largely Independent Tour	Mix of Independent Tour and Package
Tourism organisation (tourism board budget)	Small (£0.6 million)	Small (£0.6 million)	Medium (£1.48 million)
Private tourism sector	Weak	Weak	Strong

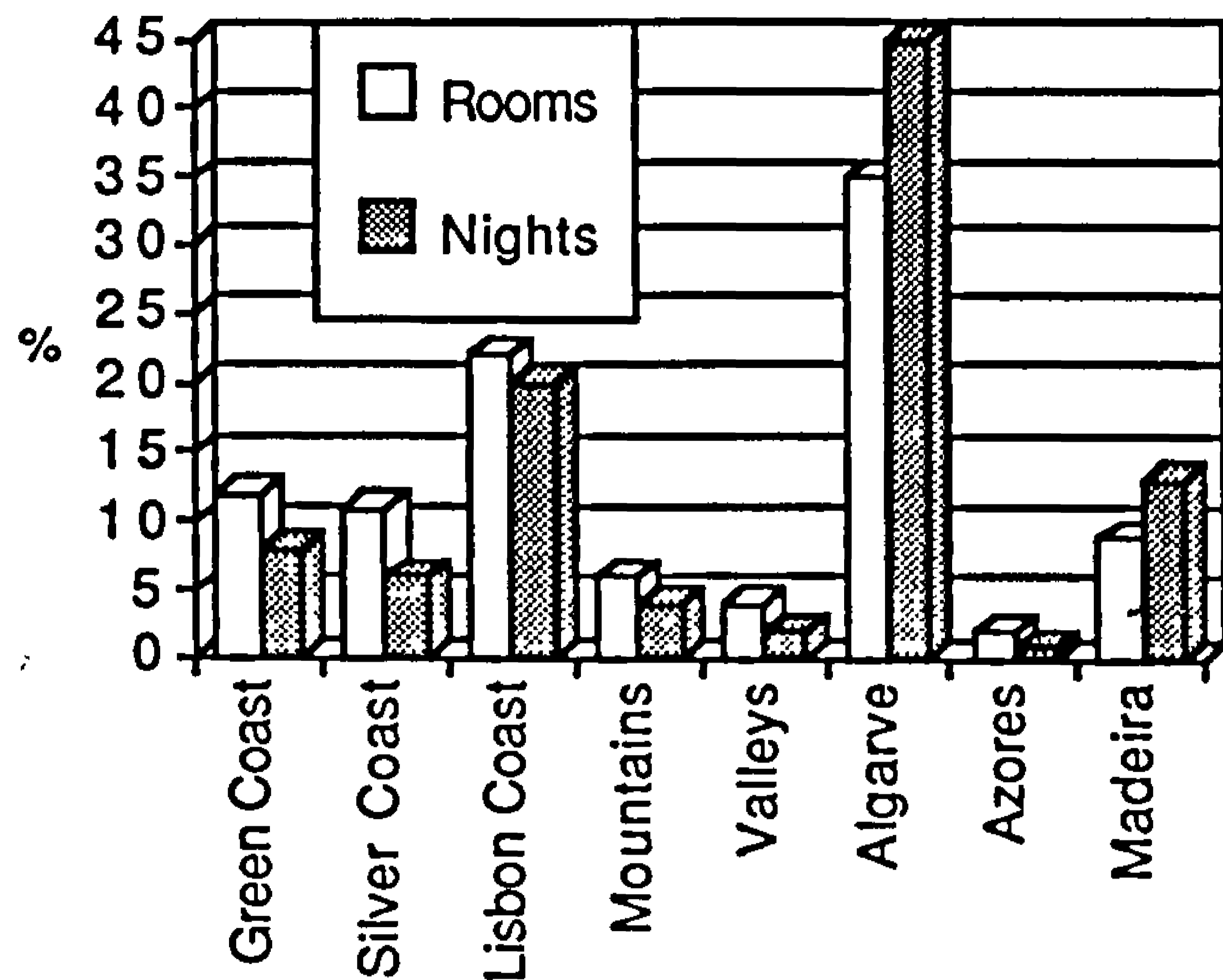
Sources: INE (s/y); DGT (several publications); RTBs (activity and budget plans)

Table 5.1b - Characteristics of tourism in the Portuguese promotional regions (Algarve, Mountains, and Valleys)

	Algarve	Mountains	Valleys
Location	South	Central-North	Central-South
Climate	Mediterranean	Atlantic	Atlantic
Economic structure	Tourism, agriculture, and fishing	Agriculture and some small sized industry	Agriculture and a few services
Share of the national tourism in bednights (excluding the Madeira and Azores islands)	53%	5%	2%
Stage of development	Consolidation/Stagnat	Involvement	Involvement
Tourist density	Crowded	Not crowded	Not crowded
Life style	Small towns Many foreign influences	Small towns Few foreign influences	Small towns Few foreign influences
Visitors	Mainly tourists	Mainly excursionists	Mainly excursionists
Ratio tourism bednights Portuguese/Foreigners (%)	19/81	86/14	70/30
Main foreign markets (bednights)	UK (46%) Germany (22%) Netherlands (10%) Ireland (4%) Spain (4%)	Spain (24%) France (17%) Germany (11%) UK (9%) Italy (6%)	Spain (16%) Germany (16%) France (13%) Italy (12%) UK (7%)
Tourism products	Highly specialized: mass beach tourism; also golf courses, gastronomy, etc	Emerging (and diversified) forms of tourism: rural, ecological, cultural, mountains, spas, gastronomy, skiing, dams, archaeological sites, etc	Emerging (and diversified) forms of tourism: rural, ecological, cultural, old villages, gastronomy, dams etc
Travel characteristics	Largely Packages	Largely Independent Tour	Largely Independent Tour
Tourism organisation (tourism board budget)	Large (£6 million)	Small (<£0.6m)	Small (<0.6m)
Private tourism sector	Strong	Weak	Weak

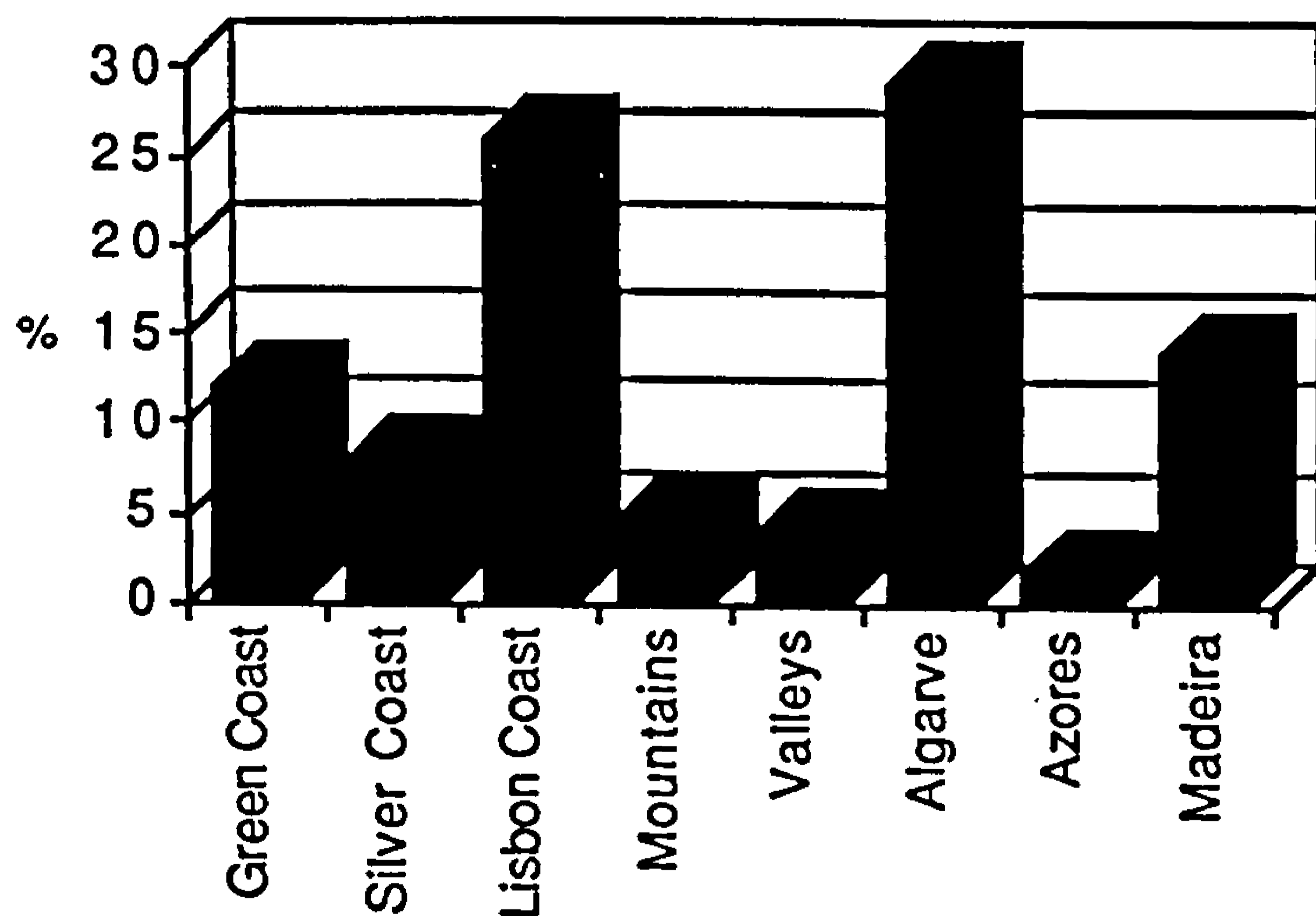
Sources: INE (s/y); DGT (several publications); RTBs (activity and budget plans)

Figure 5.19 - Geographic distribution of tourism rooms and bednights in Portugal by promotional regions (1994)



Source: DGT (1996), INE (1994)

Figure 5.20 - Geographic distribution of the jobs created by the tourism industry in Portugal by promotional regions (1994)



Source: DGT (1996), INE (1994)

The tourism potential offered by the Mountains region is also great. The only Portuguese ski resort is located in this region (Serra da Estrela). In addition to that, the region offers fine scenarios, mountains, extensive woodlands, a number of castles, unspoiled life-styles, typical villages, leisure facilities associated with dams, and an excellent cuisine. If properly developed the recent archaeological findings of the Côa Valley (the oldest Paleolithic paintings ever discovered in Europe outside caves) may also contribute to the expansion of alternative forms of tourism in the region (for an expanded analysis see DGT, 1993e).

5.3.2.4 Impact of tourism on the economy

The growing expansion of tourism in Portugal, and in particular of international tourism (see sections 5.3.1, 5.3.2 and 5.3.2.1), has brought important economic benefits to the country. Portugal is already the world's 18th largest tourism earner (table 5.2), and its receipts from international tourism have grown more rapidly than expenditure (figure 5.21), a situation which has brought significant net benefits to the balance-of-payments. According to the OECD (1995) tourism accounted in 1993 for 25% of the total Portuguese exports of goods and services, and its rate of coverage of the balance-of-payments amounted to 41.2%.

The tourism sector is also an important source of employment generation in Portugal. The number of jobs created by tourism in 1994 amounted to about 300,000, i.e. 6% of the Portuguese working population, which represents almost the same share of jobs of the building industry, but less than the employment generated by manufacturing and agriculture (figure 5.22).

Between 1980 and 1993 the average annual growth of the Portuguese tourism was of 10.45%, which is the fastest growth among the twelve EU countries, as well as one of the best in the world (see table 5.2). In 1993 the impact of tourism on the GDP was of 4.8%, which is higher than other important destination countries such as Greece (4.6%), Spain (4.1%) and the UK (1.5%) (see table 2.3).

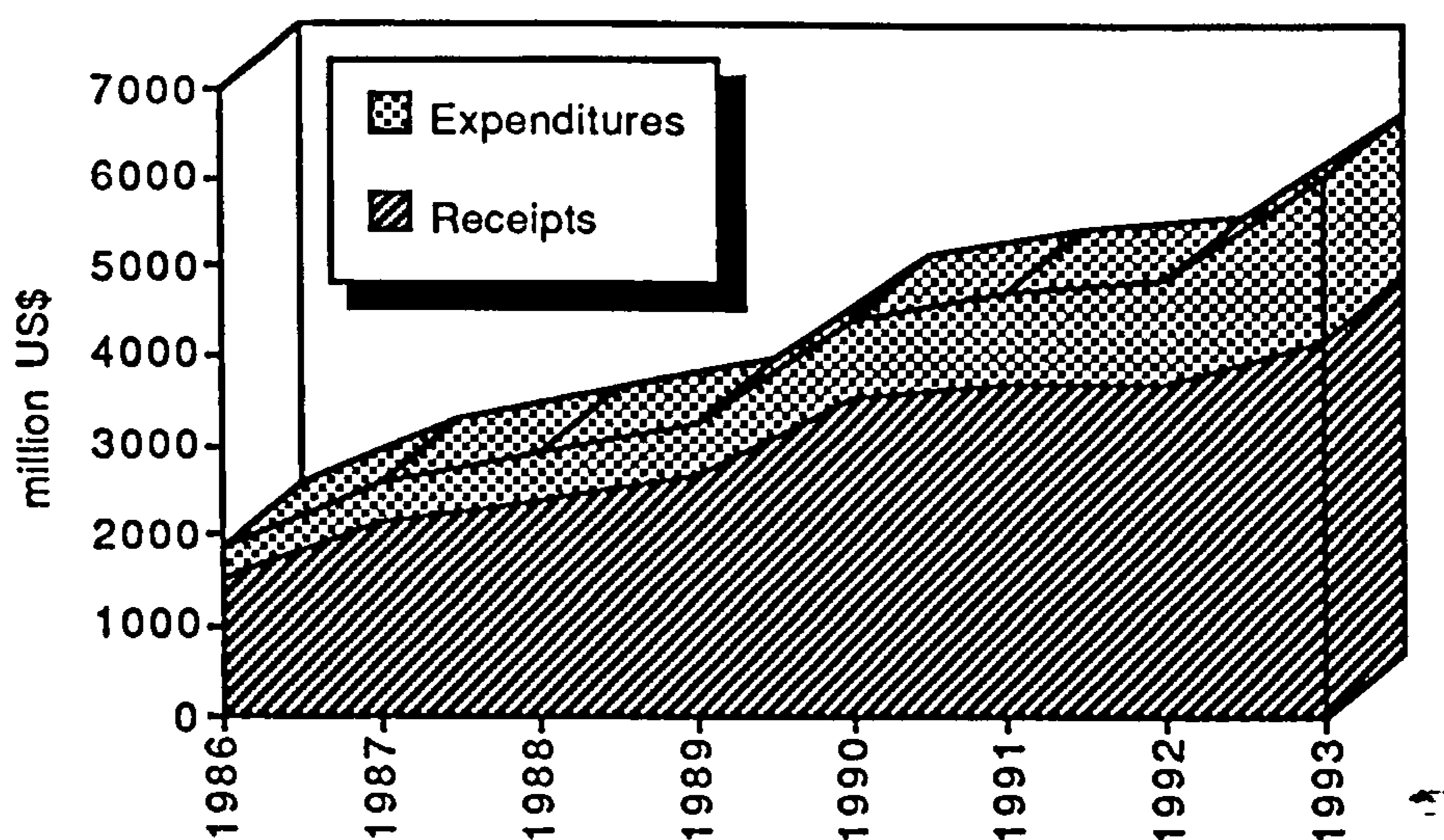
Contrary to the position in a number of countries where the tourism development process has been followed by large imports of goods and services, tourism in Portugal has expanded with important links to the domestic economy. Due to its tight link to the domestic economy the induced demand produced by tourism is over 1.5, reaching figures of 1.949 in tourist restaurants, 1.8 in air transport, and 1.684 in five, four and three star hotels (DGT, 1996b; OECD, 1992; Silva, 1989).

Table 5.2 - World's top 20 tourism earners (1993)

Rank (1993)	Country	Receipts US\$ Million	Share of receipts worldwide (%)	Average annual growth rate (%) (1980/93)
1	USA	57,621	18.75	14.37
2	France	23,410	7.62	8.37
3	Italy	20,521	6.32	8.21
4	Spain	19,425	6.68	7.30
5	Austria	13,566	4.41	5.90
6	UK	13,451	4.38	5.28
7	Germany	10,509	3.42	3.68
8	Hong-Kong	7,562	2.46	14.39
9	Switzerland	7,001	2.28	6.34
10	Mexico	6,167	2.01	
11	Canada	5,897	1.92	7.57
12	Singapore	5,793	1.88	11.34
13	Thailand	5,014	1.63	14.45
14	Netherlands	4,690	1.53	8.28
15	China	4,683	1.52	17.83
16	Australia	4,655	1.51	12.85
17	Poland	4,500	1.46	23.75
18	Portugal	4,176	1.36	10.45
19	Belgium	4,071	1.32	6.43
20	Indonesia	3,988	1.30	23.90

Source: WTO (1995)

Figure 5.21 - Receipts and expenditure created by international tourism in Portugal (1986-93)



Source: WTO (1995, 1992)

However, with the growing globalization of the Portuguese economy (see section 5.2) it seems that this favourable scenario might worsen in future, since imports of goods and services might start to increase. Bearing that in mind it seems that some sort of action should be taken by the government, with the aim of strengthening the cooperation established among all organisations linked to tourism and to optimize its multiplier effect. One of the aims of this thesis is to provide an insight into the characteristics of the relationships established among the organisations associated with the tourism sector in Portugal, with the objective of evaluating whether there is still room for further improvement in this area or whether organisations establish enough links with each other and, thus, maximize the economic multiplier effect created by tourism (see chapter 7).

Despite the favourable economic evolution over the recent past several weaknesses may, nevertheless, be observed in Portuguese tourism. For instance, figure 5.23 shows that the average length of stay of international tourists is continuously decreasing. Indeed, in only fifteen years the average length of stay has fallen by 34%, i.e. from 10.4 days in 1979 to 6.9 days in 1994, which means that by spending fewer days in Portugal it is also likely that less money is spent by tourists.

In addition to that it is also observed that the receipts generated by international tourism in real terms have also decreased (figure 5.24). Indeed, between 1987 and 1992 the number of international tourist arrivals rose by 27%, from 16.2 million to 20.5 million (figure 5.3), whilst in the same period of time the economic benefits created by international tourism fell by 3% (figure 5.24).

Furthermore, the interest of the government in attracting large numbers of mass tourists should be questioned. Figure 5.25 shows that the international tourism receipts peak during the high season (June - Septembre), because it is during this period that large numbers of tourists arrive in Portugal (see also figure 5.7). However it is also observed that the average revenue created by the summer tourist flows is much lower than that obtained in the mid and low seasons (figure 5.25). For instance, whereas the average revenue created by a tourist bednight in February amounts to PTE 4,864 (£19.46), the revenue created by a tourist bednight in August is of only PTE 1,818 (£7.27), i.e. the average receipt per tourist bednight increases by 168% between August and February.

Although it can be argued that a profitable industry might not only depend on the profit obtained per unit sold but on the whole revenue made by that industry, some additional calculations must be made when dealing with the tourism sector. Indeed, despite the fact that larger destinations areas are likely to create more jobs and revenue, it must also be recognized that there are

additional costs which cannot be hidden. For instance, money has to be paid to doctors, nurses, policemen, etc, who seasonally are moved into large tourism regions in order to face the extra demand created by tourism. In addition to that, more tourists also represent increased costs to local authorities in areas such as water supply, sewage treatment plants, garbage collection, safety, maintenance of streets and roads, gardening, etc.

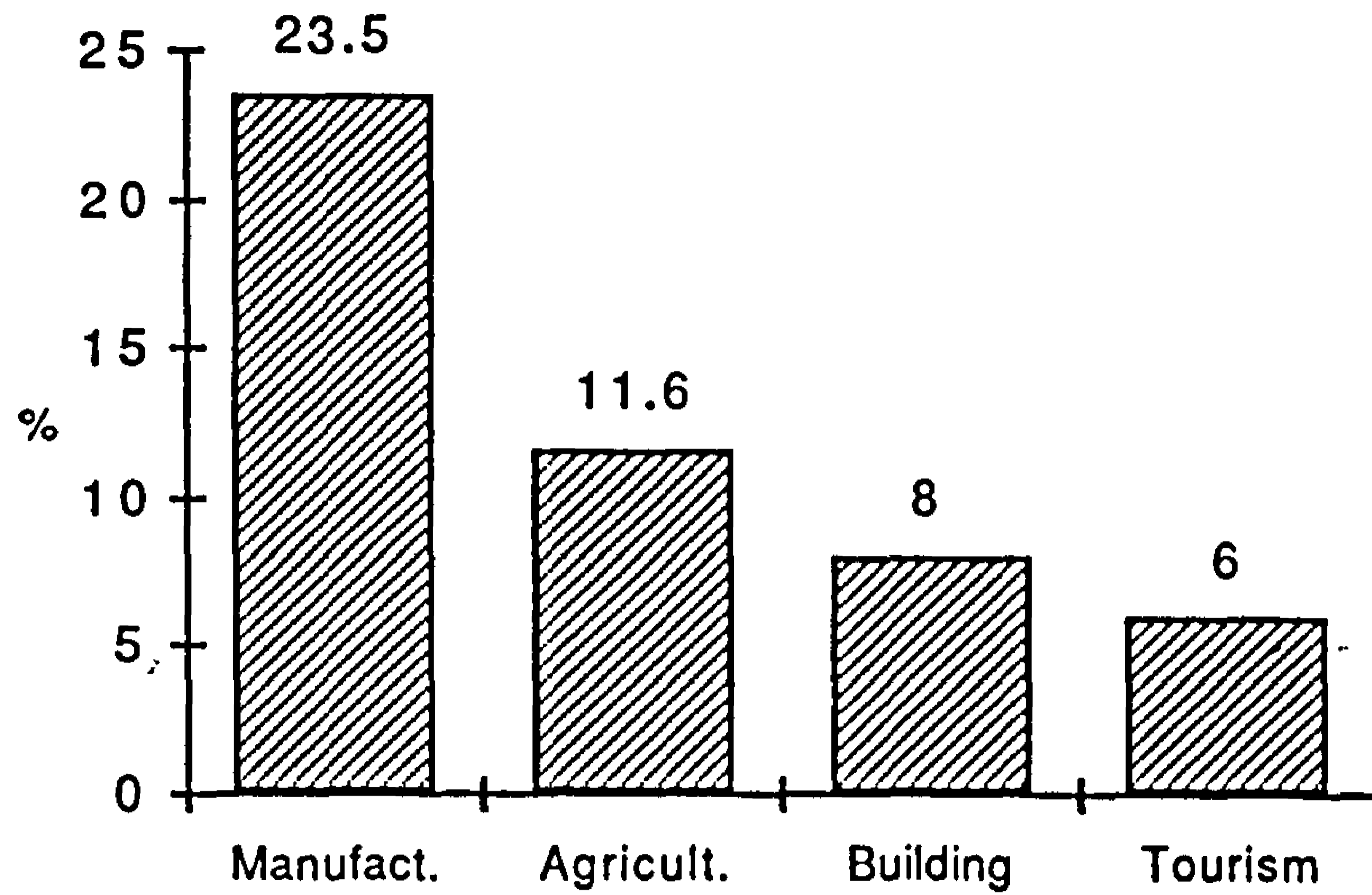
It seems that these three areas, i.e. the decrease of the average length of stay of international tourists; the decrease of real receipts from international tourism; and the low benefits obtained from some forms of mass tourism developments, must urgently be tackled by the Portuguese government. The alternative organisational framework introduced in chapter 4 (networks) seems to contain the potential to solve part of these problems, since networks of organisations have the capacity to improve the coordination of strategies among organisations and, therefore, to increase the tourism multiplier effect. Closer interorganisational cooperation may also increase the average receipts per capita and motivate tourists to stay longer in the destination areas. Despite these, and other, (theoretical) advantages which might be created by networks (for an expanded analysis see chapter 4) it is nevertheless important to evaluate whether organisations are sensitive to network potential as well as to whether organisations would be willing to engage in an organisational structure which demands a number of changes in terms of operating philosophies, working styles, organisational culture, as well as stronger levels of interorganisational cooperation. This is what will be evaluated in chapter 8.

5.3.2.5 Tourism organisation

5.3.2.5.1 Introduction

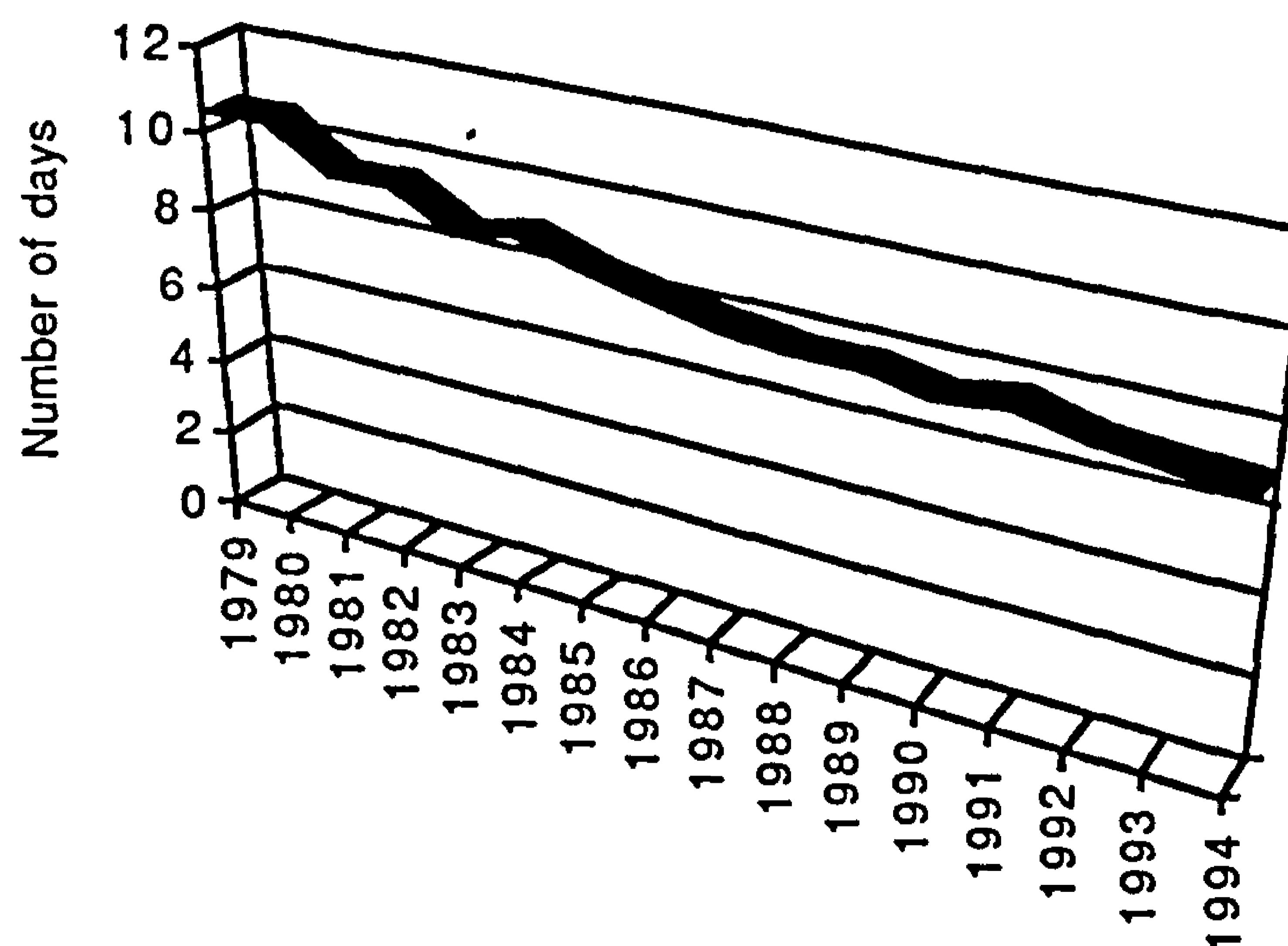
The origin of Portuguese tourism organisation may be traced back to 1906 when the first (non-governmental) agency for tourism was created ('Sociedade de Propaganda de Portugal (SPP)') (see also section 5.3.1). Taking into account the success achieved by the SPP the Portuguese government decided, five years later in 1911, to establish the first governmental tourism organisation ('Repartição de Turismo'), which became answerable to the 'Ministério de Fomento' (Pina, 1988). By this time tourism was seen as important among the other national departments, since it was believed that it could strengthen the links with other European countries and break through the isolation inherited from the previous monarchic governments (see also section 5.3.1).

Figure 5.22 - Share of jobs created by tourism and other main economic sectors in Portugal (1994)



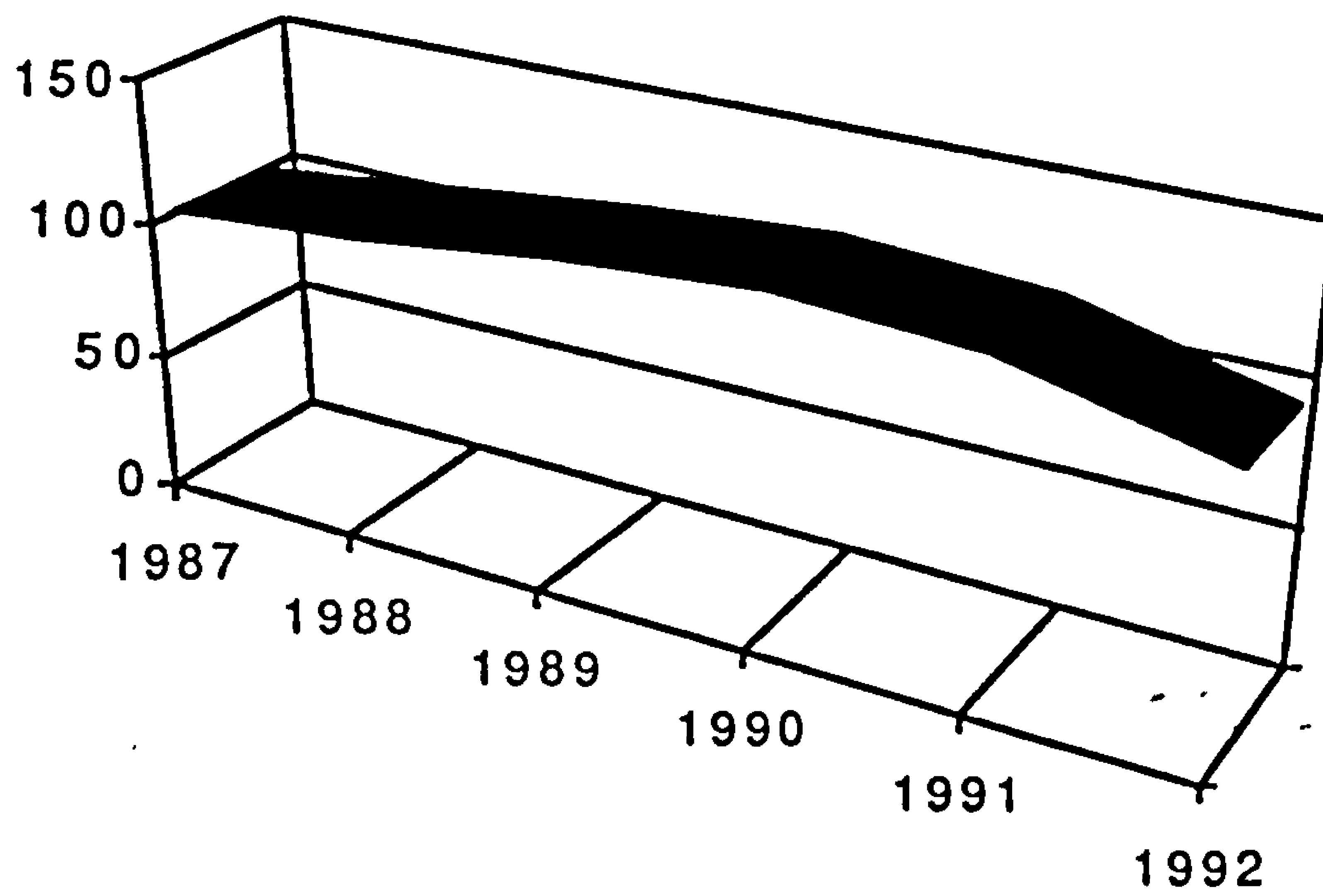
Source: INE (1994; p. 10)

Figure 5.23 - The average length of stay of international tourists in Portugal (1979-1994)



Source: DGT (1996, p. 79)

Figure 5.24 - Trends in international tourism receipts in real terms (Portugal: 1987-92) (1)

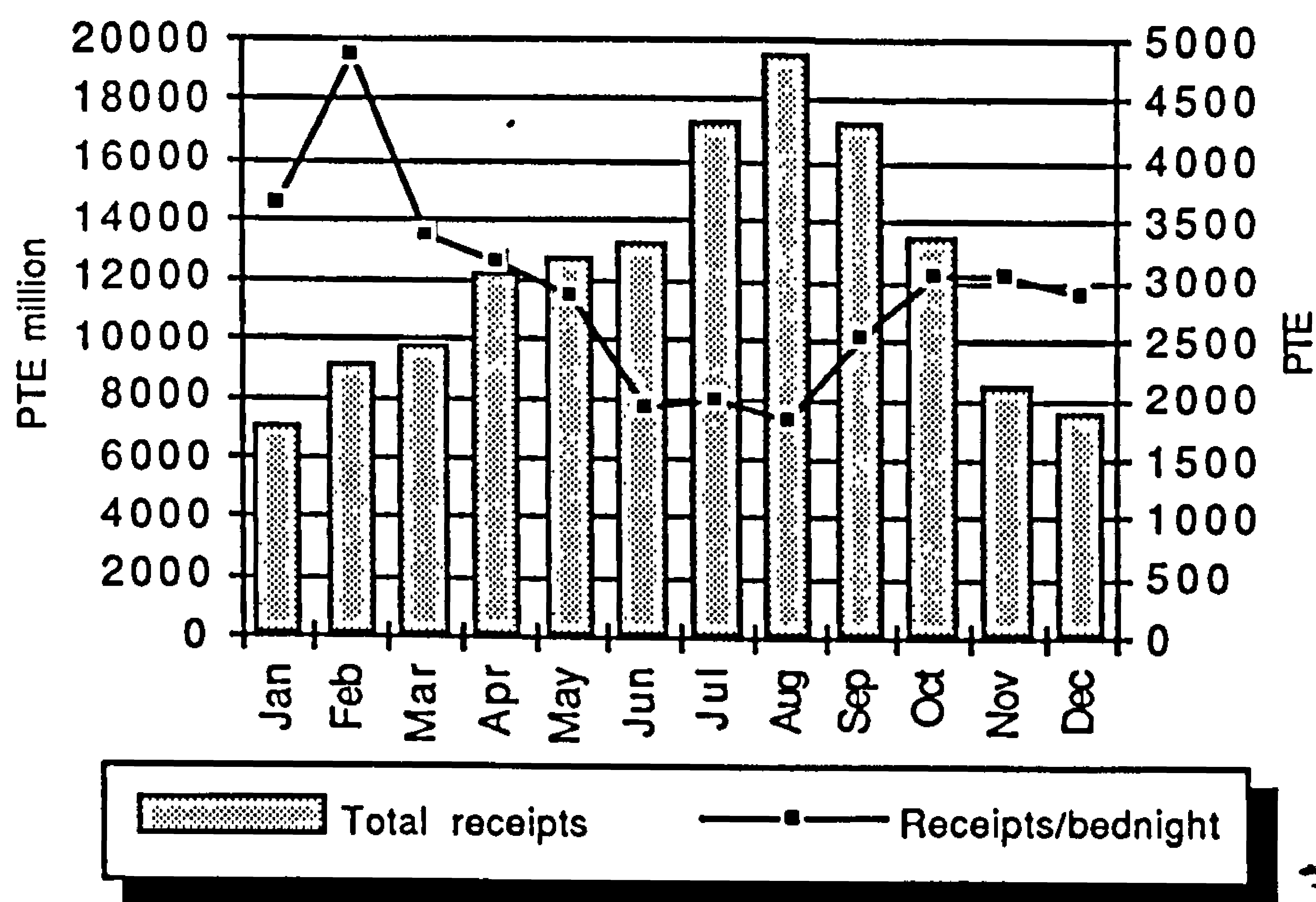


Source: OECD (1994; p. 104)

(1) After correcting for the effects of inflation

1987 = 100

Figure 5.25 - Total and average receipts per bednight in all accommodation by month (1993)



Source: INE (1994; pp. 48, 150)

However, in the first phase of the dictatorship in Portugal (1926/74) the relative importance of tourism at national level decreased very rapidly. In the two initial 'Planos de Fomento' (1953-1964) no reference whatsoever was made to tourism. Only with the growing expansion of tourism in the northern European countries (see section 2.3.2), and with the increasing number of international arrivals in Portugal (see figure 5.1) did it start again to receive more attention from the Portuguese government (see also section 5.3.1).

Despite the growing number of arrivals in Portugal during the 1960s it evolved up to the late 1970s without any particular strategy, following the trend observed in many other countries, as documented by the report published by the WTO concerning the tourism development process in the six WTO regions (WTO, 1980) (see section 2.3.2). That is, the expansion of tourism in Portugal was based on actions implemented by private sector organisations, to which some scattered government strategies were added. The official 'policy' adopted by the government during this phase was based on the principle that 'government policies should not conflict with decisions taken by private sector organisations' (MCT, 1991; p. 11).

As a result of that, up to the middle 1970s few policies were put forward in the tourism sector. The most important were, undoubtedly, the establishment of a General Directorate for Tourism in 1968 ('Direcção-Geral de Turismo'), in substitution of the former 'Repartição de Turismo'; the creation of a National Institute for Tourism Training in 1965 ('Instituto Nacional de Formação Turística'), with responsibilities for tourism training; the directives passed by Marcello Caetano between 1956-58 (see also section 5.3.1); and the physical plans set up in the Estoril Coast (1914), in Fátima (1940) and in the Algarve (1970).

By that time, tourism organisation at the local level relied on 'Comissões de Iniciativa', set up between 1920 and 1921. The origin of the 'Comissões de Iniciativa' may be traced back in several spa or coastal resorts (see section 5.3.1). These organisations were further replaced in 1940 by 'Comissões Municipais de Turismo' and 'Juntas de Turismo' (DL 31095/40) (see Pina, 1988; p. 43). Since then no further changes have been introduced into the structure of local tourism organisation.

At regional level, tourism organisation included regional tourism commissions ('Comissões Regionais de Turismo') set up between 1956 and 1957. However, due to their inefficiency, ineffectiveness and different methods of functioning, a profound restructuring was initiated in 1982, which gave rise to the first administratively and economically autonomous RTBs ever set up in Portugal (see also section 5.3.1).

The years that followed the end of the dictatorship (1974) were characterized by political, social and economic instability. Many companies were nationalized (e.g., banks, insurance, oil, cement, paper meal, etc), and in the tourism sector the Portuguese government decided to create an organisation called 'ENATUR' (National Tourism Company (NTC)) responsible for the planning and management of several government-owned and -managed hotels and restaurants (for an expanded analysis see section 5.3.2).

In the middle 1990s, the tourism organisation in Portugal may schematically be represented by figure 5.26.

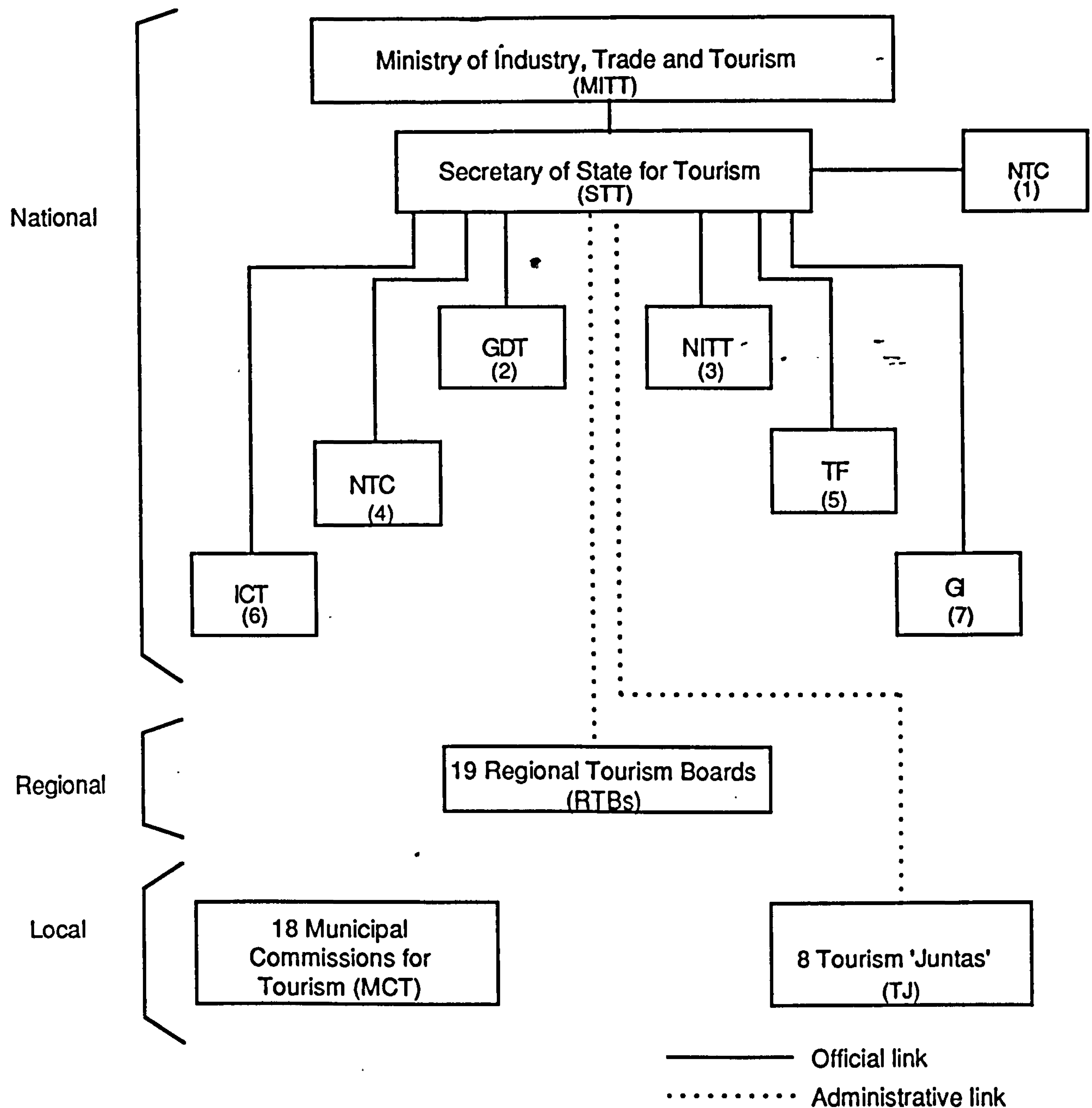
5.3.2.5.2 National level

As illustrated by figure 5.26 the head of Portuguese tourism organisation is represented by a Ministry, the highest position that any sector may reach in Portugal at national level. Due to the economic importance of tourism in Portugal (see section 5.3.2.4) great emphasis has been placed by almost all governments on the tourism sector since the end of the dictatorship (1974). Only between 1981 and 1983, and later between 1985 and 1987, did tourism lose ministry status and, due to its 'horizontal' characteristics, become directly answerable to the Prime Minister, through the Secretary of State for Tourism (STT) (Pina, 1988; pp. 252-253). It was then argued that by reporting to the Prime Minister more direct and close links could be established between tourism and other economic sectors.

It is, nevertheless, at ministry level that tourism has been represented in almost all governments since 1974. Most governments decided to put tourism and trade together in the same ministry (Ministry of Trade and Tourism), which, according to Rosa Pires and Costa (1992; p.105), is still a controversial issue in Portugal, since the association of tourism and trade *can partly be explained by the structure of the Department of Trade which supports and promotes, to a large extent, tourism marketing and promotion abroad.*

However, as a result of the last election (October 1995) the Social Democrats, who spent nine non-stop years in power, were overrun by Socialists. Under the new government a 'super ministry', as it is labelled in Portugal, which includes the departments of 'industry', 'trade', and 'tourism', was set up (Ministry of Industry, Trade and Tourism/MITT). That is, for the very first time the tourism sector is linked to the Department of Industry. Putting tourism, industry and trade into the same department the new government believes that it will become

Figure 5.26 - The tourism organisation in Portugal



- (1) National Tourism Council (Conselho Nacional de Turismo) - advisor agency to the Secretary of State for Tourism
- (2) General Directorate for Tourism (Direcção Geral de Turismo) - planning, development, statistics, licensing, etc
- (3) National Institute for Tourism Training (Instituto Nacional de Formação Turística) - training
- (4) National Tourism Company (Empresa Nacional de Turismo) - responsible for the planning and management of government-owned and -managed hotels and restaurants
- (5) Tourism Fund (Fundo de Turismo) - funding
- (6) Investment, Commerce and Tourism (Investimentos, Comércio e Turismo)- promotion abroad
- (7) Gaming Inspectorate (Inspeção Geral de Jogos) - gaming

easier in future to solve most of the conflicts that used to emerge between the trade and industry departments. It is also argued that under the new ministry decisions simultaneously involving trade, industry and tourism may be accelerated, and costs and bureaucracy reduced.

It is then the MITT and the STT, the later reporting to the MITT, which assume the top tourism responsibilities in Portugal. However, there are also other organisations at the national level, all of them reporting to the STT, with important responsibilities in the tourism sector.

The most important and powerful of them is the General Directorate for Tourism (GDT). The GDT is the oldest Portuguese official organisation, whose origin dates from 1911 (see section 5.3.2.5.1). The GDT is an agency with economic and administrative autonomy, which is responsible for a number of matters, such as planning, research, publication of information, licensing of new equipment and infrastructure, accommodation rating, etc (DL 124/82; DL 155/88).

The GDT has also been responsible in recent years for the coordination of several regional planning and development strategies set up in the Southern part of Portugal ('PROTAL' - Regional tourism plan for the Algarve region), in the Central part of Portugal (skiing area of Serra da Estrela) as well as in the Northern part of the country (Port wine region of Douro Valley) (for an expanded analysis see section 5.3.2.7).

The second most important national organisation is the National Institute for Tourism Training (NITT), which was set up in 1965, and since then has assumed an important role in the tourism education field. According to legislation, the NITT is the official agency responsible for the coordination, quality and stimulus of tourism education and research in Portugal (DL 333/79). The NITT is also responsible for operating several training schools spread all around the country (e.g., Oporto, Coimbra, Lisbon, Estoril and Faro), which have provided an important source of specialized personnel for the hospitality industry.

However, the activities developed by the NITT have been excessively centred on hotel and catering education while other areas, such as planning, development, economics, behaviour, geography, sociology, marketing, etc, have been left behind. Indeed, the NITT being responsible for working together with the Ministry of Education on these matters, it is bizarre to observe how few initiatives have been implemented in this field (see also section 7.2.7). As far as it is known, there is no policy for tourism education in Portugal. As a result of that, few resources have been channeled, for instance, into post-educational programs (e.g., MSc, MPhil, PhD), when there are at present an astonishing number of new courses emerging in Portugal without specialized staff to run them. This is particularly serious when it is becoming

widely recognized that one of the cornerstones for the success of tourism in the 21st century is to *eliminate amateurism at all levels through well-designed education and training programmes, and the implementation of a sound system of professional standards* (WTO, 1994a, p. 78).

The National Tourism Council (NTC) is an advisory agency to the STT. According to legislation passed in 1987 (DL 234/87) the composition of the NTC includes a number of public and private sector organisations, such as the representatives of national tourism organisations (e.g., GDT, NITT, TF, etc), all RTBs presidents, the representatives of local tourism organisations (Tourism 'Juntas' and Municipal Commissions of Tourism'), the representatives of other national departments (e.g., planning, environment, national parks, treasury, culture, health, municipalities, etc), the representatives of private sector organisations (e.g., travel agents, industry, camping, rent-a-car, building industry, hotels, unions, gaming), and the representatives of the main transport operators (i.e., rail, air, car). All these organisations take part in the meetings promoted by the NTC. However, the NTC is able also to work in sections according to the specificity of each problem (e.g. planning, organisation, education and promotion).

The theoretical importance of the NTC to the tourism sector is enormous, because it offers potential to promote the development of national tourism policies on the basis of wide participation ('lateral thinking'). When based on a restricted number of issues tourism policies are likely to fail to address the wide complexity of tourism problems as well as take full advantage of the potential that might be produced by tourism such as economic multiplier, enhancement of the social and natural environment, etc (see chapters 1 and 2). However, the efficiency and effectiveness of the NTC has been strongly questioned over recent years, since meetings are sporadic and do not produce practical solutions.

The National Tourism Company is an agency responsible for the planning and management of several government run hotels and restaurants (DL 662/76; DL 157/86). In particular, the National Tourism Company is responsible for the management of one of the best forms of accommodation offered by Portuguese tourism (*Pousadas*). Indeed, most of the Portuguese *pousadas* have been created from the reinstatement of important units of the Portuguese heritage, such as castles, monasteries, houses of historic and cultural value, etc. In addition, the facilities and services offered by the *pousadas* are living examples of the history and culture of the region where they are located, such as in terms of architecture, furniture, gastronomy, etc. In a world where the tourism industry has been accused of commercializing and obliterating cultures, the Portuguese *pousadas* may be viewed as an outstanding example of how a symbiotic relationship may be established between profitable forms of tourism and respect for

local culture. With the present trend in Portugal towards privatization (see section 5.3.2.7) it is likely that soon or later the Portuguese 'pousadas' will also be privatized.

Though the financing of tourism projects may be obtained from several sources (e.g., private and public banks, national programs set up by other national departments, such as those launched under the umbrella of the European Regional Development Fund (ERDF), the European Social Fund (ESF), the European Agriculture Guide and Guarantee Fund (EAGGF), and the European Investment Bank (EIB), the Tourism Fund (TF), which works closely with the GDT, is the main national agency responsible for the financing of the Portuguese tourism industry. In particular the TF is responsible for providing credit at lower interest rates to entrepreneurs interested in investing in the tourism sector (Law 2082; DL 149/80).

The TF has set up several funding schemes ('SIFIT') which have enabled the implementation of policies launched by the Portuguese National Tourism Plan (see section 5.3.2.7). However, it has also been noticed that the procedures involved in the financing of projects are too bureaucratic and time consuming, since most decisions must obtain the approval of several national departments, such as planning, environment, health, etc (see Público, 1995). The simplification of such procedures is, nevertheless, among the priorities of the new government (see Diário de Notícias, 1996).

The Gaming Inspectorate (GI) is the national agency responsible for the planning and regulation of gaming activities, which are one of the most important sources of profit for the tourism industry as well as of taxes for the Portuguese government (DL 450/82).

Finally, the marketing and promotion of tourism are under the umbrella of the Investment, Commerce and Tourism Institute (ICT). The administrative structure of the ICT is recent, since the former national agency responsible for tourism marketing and promotion was the Tourism Promotion Institute, which was dissolved in the early 1990s ('Instituto Nacional de Promoção Turística'). Due to the close link between the Tourism and Trade Departments, the government decided to merge the activities developed abroad by both departments in order to reduce bureaucracy and costs.

As far as tourism is concerned the ICT is responsible for tourism marketing and promotion abroad, though there are some tourist offices in Portugal operated by the ICT. However, most of the marketing and promotion activities carried out within Portugal are undertaken by the RTBs (see section 5.3.2.5.3). Portugal's tourism promotion abroad is undertaken on the basis of the promotional regions presented in map 5.5 (Green Coast, Silver Coast, Lisbon Coast, Algarve, Mountains, Valleys, and the islands of Madeira and Azores).

5.3.2.5.3 Regional level

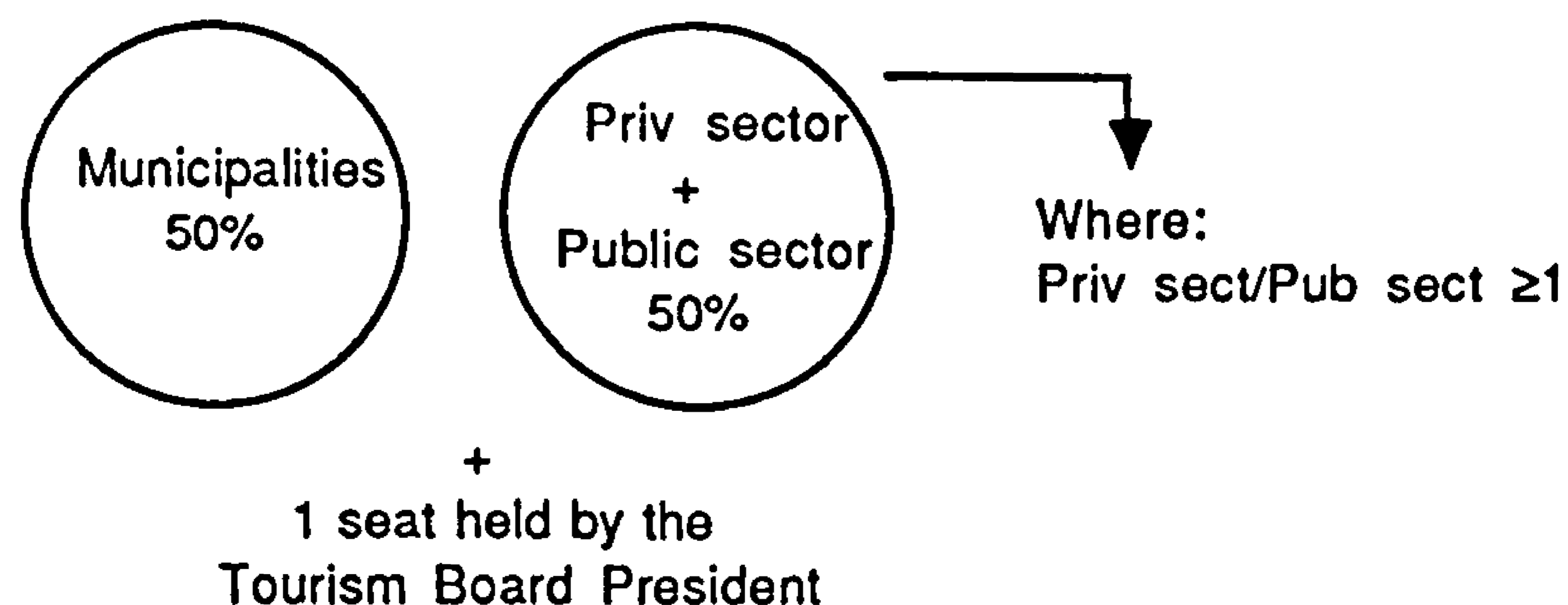
The origin of the Portuguese regional tourism organisation may be traced back to the former 'Comissões Regionais de Turismo', which were set up by legislation passed in 1956 and 1957 (see section 5.3.1). However, the regional tourism organisation is at present under the responsibility of Regional Tourism Boards (RTBs), which were established by laws enacted in 1982 (DL 327/82) and in 1991 (DL 287/91) (see map 5.6 - based on DGT, 1994).

The Portuguese RTBs may be described as associations of municipalities for tourism purposes. Indeed, provided that there are at least two geographically linked municipalities willing to create a tourism board, then such a board may be established.

The structure of the Portuguese RTBs comprehend a board of directors and a regional commission. The board includes a president and, depending on its size, up to four vice-presidents. Vice-presidents may be linked to the board either on a full or part time basis, depending again on its size.

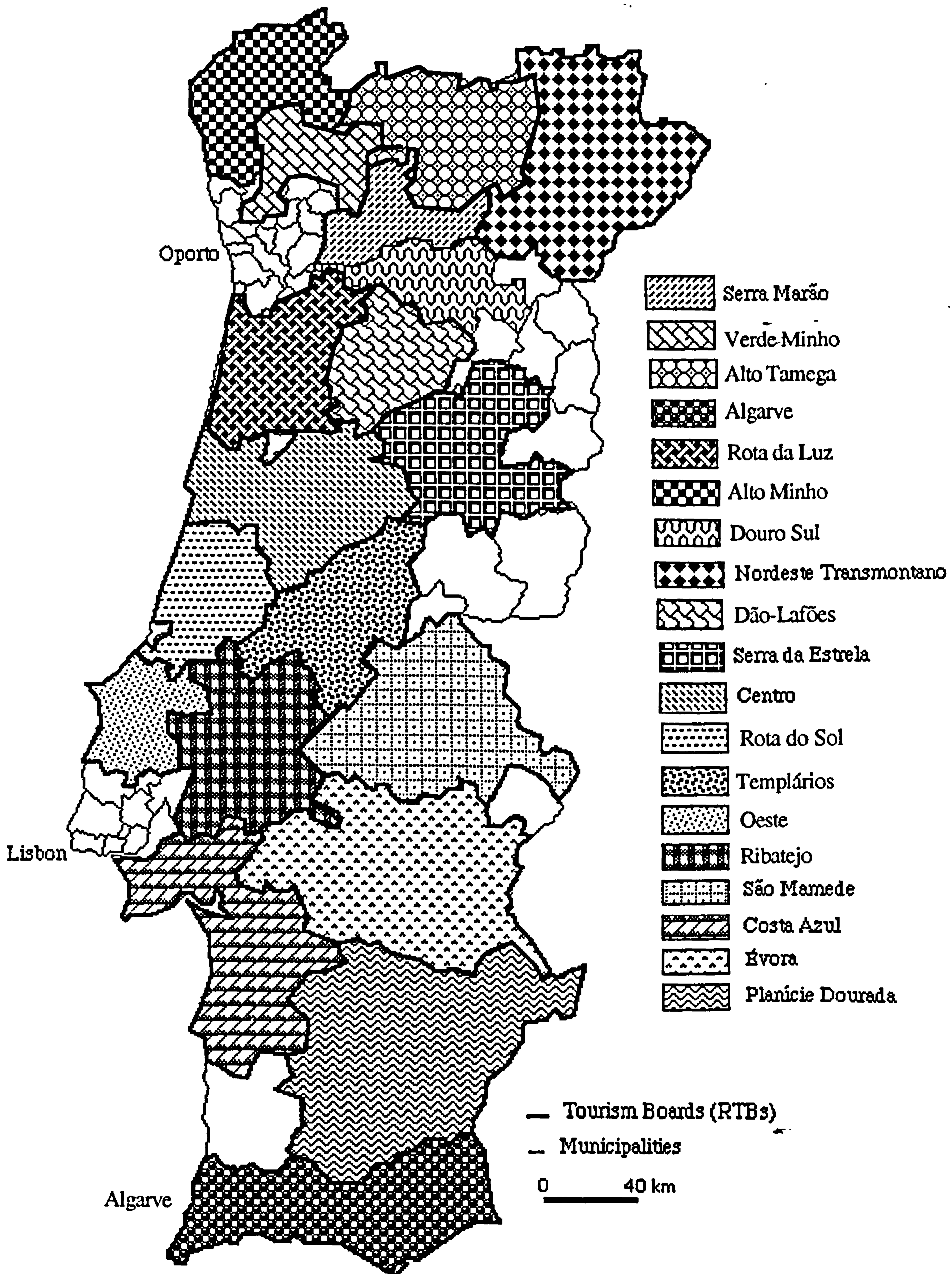
The size of regional commissions depends on the number of municipalities associated with the board. To put it more simply, every municipality which decides to join a board holds a seat in the regional commission. In addition, there are a number of public and private sector organisations which can never exceed the number of municipalities. The number of public sector organisations must also not be above the number of private sector organisations (see figure 5.27).

Figure 5.27 - Structure of the Portuguese regional tourism commissions



Whereas public sector organisations (e.g., planning and environmental commissions, port authorities, unions, cultural and sport organisations, universities and polytechnics, etc) are

Map 5.6 - The Portuguese Regional Tourism Boards (RTBs)



appointed by the board, the following private sector organisations must necessarily be represented in the regional commissions: hotel associations, catering associations, travel agents associations, and rent-a-car associations. When a regional commission is large enough to include other private sector organisations, then they may be directly appointed by the board.

Several weaknesses may be pointed out in the way in which the RTBs are set up in Portugal. To start with, the RTBs may be created only on the basis of the nature of the relationships established among municipalities rather than on tourism products. There is evidence that municipalities move from one board to another only because their relationships among each other have improved or deteriorated. It is nevertheless the aim of this thesis to provide an expanded analysis of the implications that such a situation may have on their functioning (see chapter 7).

Furthermore, it is shown by map 5.6 that despite its small size the regional tourism organisation in Portugal comprehends 19 RTBs. Furthermore, a comparison between map 5.6 (RTBs), map 5.5 (promotional regions) and map 5.4 (planning regions) shows that the boundaries of the RTBs do not coincide either with the promotional or with the planning regions, a situation which is likely to affect their functioning. These are two issues which were also taken into account with regard to the research objectives of this thesis, and for which an expanded discussion is introduced in chapter 7.

In addition to these two problems, it is also observed that the way in which the regional tourism commissions are set up (see figure 5.27) appears to be too inflexible, since less than 25% of the seats are freely selected by the boards; when it was viewed in chapter 2 and chapter 3 that the regional tourism organisation must be established according to the characteristics of each region. It is the aim of this thesis to analyse how RTBs perceive this situation as well as to assess whether this (only apparent?) inflexibility affects the functioning of tourism at the regional level (for an expanded analysis see chapter 7).

It is also stated in the legislation that at least 50% of the RTBs budget must be spent on promotion, a situation which appears to be bizarre when the Portuguese RTBs show different levels of tourism development (see tables 5.1a and 5.1.b), and therefore their priorities are likely to vary from region to region. To put it in a different way, and following Miossec's model (Miossec, 1977), whereas some RTBs might be concerned with attracting larger numbers of visitors because they are in the early stages of development (e.g. RTBs located within the Green Coast and Silver Coast), others might, instead, be preoccupied with the impact produced by the large number of tourists which visit their regions (e.g. RTBs located within Algarve and Lisbon Coast). It is also one of the aims of this thesis to discuss how

regional tourism actors perceive and react to this situation (see sections 7.3.1, 7.3.3 and 7.3.14).

In terms of responsibilities it is observed that the Portuguese government has already passed important powers to the RTBs, following both the philosophy of power devolution commenced in Portugal after the 1974 Revolution (see section 5.2.2), as well as the world's trend towards more down-top approaches (see section 3.3.5), horizontal coordination of policies (see section 3.3.6) and, generally speaking, following the changes introduced into the planning and organisational systems over the last fifteen years (see sections 2.4 and 3.3.7). In the mid-1990s the Portuguese RTBs are responsible for a number of matters including promotion within Portugal; promotion abroad (coordinated by the ICT); inventorying of the regional tourism resources; research and study of the tourism phenomenon within their regions; establishment and implementation of policies and strategies; etc. Nevertheless, the question that should be brought to this discussion is whether they can accomplish all these tasks when they deal with scarce resources. Again, this is a matter that will be discussed in chapter 7 (see in particular section 7.2.1).

As far as the vertical and horizontal coordination of policies is concerned, several issues may also be raised. Firstly, it is observed that the link with the national government is very weak, since RTBs have economic and administrative autonomy and their liaison to the national government is only established by a representative appointed by the Secretary of State (see figure 5.26). However, in most situations the representatives of the STT assume a low profile in the regional commissions, for the following two main reasons. To begin with, these representatives cannot effectively interfere in the activities developed by the boards because they are autonomous. Also, in most situations they live in the region where the RTBs have their headquarters and, thus, are not informed enough about what is decided at national level. In short, most of them operate as unpowered ambassadors near to the RTBs, and, therefore, there are no effective communication channels between national and regional organisations.

Despite it being nowadays argued that rigid hierarchical organisations are no longer adjusted to today's world (see chapter 3) it is nevertheless accepted that some liaison between national and regional government must exist in order to ensure that national policies are implemented downwards by all organisations (see section 3.2.6). When the RTBs legislation was passed in the early 1980s Oliveira pointed out this problem by arguing that the Portuguese RTBs could become uncoordinated agencies of inadequate size to accomplish their aims (see Oliveira, in Pina, 1988, p. 189). Fifteen years after the legislation has been passed it is important to assess whether such a remark has become reality or not (for an expanded analysis of this issue see chapter 7).

Furthermore, and as discussed before, the structure of the RTBs includes a number of private and public sector organisations, such as environmental and planning commissions, port authorities, cultural organisations, associations of rent-a-car, travel agencies, hotels, etc. As pointed out in chapter 2 the inclusion of a large number of organisations enables the implementation of informed policies, leads to the optimization of resources, increases the tourism multiplier effect, allows the development of tourism according to the uniqueness of each region, and also brings into the decision-making and -taking process the potential of the horizontal approaches discussed in chapter 3. In this regard it seems that Portuguese legislation constitutes a great breakthrough in these matters. However, it is important to assess now the practical results produced by the legislation and discuss whether improvements must be introduced into this field (for an expanded analysis see chapter 7).

Another matter which must also be evaluated is how effective the link between RTBs and local authorities is. As discussed before, the RTBs may be viewed as associations of municipalities for tourism purposes, because their establishment only depends on local authorities. Such a philosophy seems to ensure, at least in theory, that regional tourism policies are carefully set up on the basis of local strategies, and also that regional policies are easily followed by local authorities. The legislation passed in Portugal also seems to suggest that by bringing local authorities into the core of regional tourism problems, the importance of tourism at local level is also increased. Chapter 7 will also provide an expanded analysis of these areas and assess whether these claims are valid.

Finally, it was discussed in chapter 4 that organisational structures based on the network philosophy are advantageous to the functioning of the regional tourism organisations, since they bring more cohesion, stronger coordination of policies, more informed solutions, wider participation, higher profitability, etc. It is also the aim of this research to assess whether a network philosophy could be more advantageous to the functioning of the Portuguese RTBs than the structure followed in Portugal at present (for an expanded analysis see chapter 8).

5.3.2.5.4 Local level

The origin of the Portuguese local tourism organisation dates from 1921 when the first 'Comissões de Iniciativa', answerable to the national 'Repartição de Turismo, were established. However, in the early days of the dictatorship a profound restructuring was introduced into the local tourism organisation. The 'Comissões de Iniciativa' were abolished and new

organisations reporting to the local authorities ('Juntas de Turismo' and 'Comissões Municipais de Turismo') were set up (for an expanded analysis see section 5.3.1).

The usual name given in Portugal to the local tourism organisations is Tourism Zones (TZ) ('Zonas de Turismo'), which are divided into Tourism 'Juntas' (TJ) ('Juntas de Turismo') and Municipal Commissions for Tourism (MCT) ('Comissões Municipais de Turismo') (see figure 5.26).

The origin of the TJs is linked to some former spa and coastal resorts. At present there are 8 TJs in Portugal spread all over the country (e.g., Costa do Estoril, Ericeira, Buçaco, Moledo, etc) (DGT, 1994; pp. 38-40). Despite being linked to municipalities the TJs have economic and administrative autonomy. Their organisation includes a president, appointed by an agreement between the president of the municipality and the STT, a doctor of medicine linked to the municipality, a representative of the local hotel industry, a representative of local commerce, a representative of local landlords, and the captain of the local port (i.e. the local port authority).

The MCTs have less autonomy than the TJs since they work as tourism departments within the municipalities and their presidents are appointed by the local authority. Their structure also incorporates representatives from local public and private sector organisations, such as health, commerce, landlords, hotels, the captain of the local harbour, the local police department, etc. In the mid-1990s there are 18 MCTs in Portugal (DGT, 1994; pp. 31-36).

It can be seen from figure 5.26 that the Portuguese local tourism organisations are not linked to the regional and national organisations. For instance, whereas the MCTs have no ties whatsoever with the other organisations, the TJs have only an administrative link to the STT, since the appointment of their presidents must be approved by the STT. The lack of links to regional and national organisations prevents the effective coordination of policies between local, regional and national tourism organisations (for an expanded analysis see chapter 2, chapter 3 and section 5.3.2.5.3).

It is undeniable that the local tourism organisations developed an important role in the Portuguese tourism when they were established in 1921 ('Comissões de Iniciativa'), since they worked as decentralized agencies of the national tourism organisation ('Repartição de Turismo') (see section 5.3.1). However, their importance started to be overshadowed by the restructuring put forward in the 1940s, in which the 'Comissões de Iniciativa' were abolished and the Tourism 'Juntas' and 'Municipal Commissions for Tourism', answerable to the municipalities, were created (for an expanded analysis see section 5.3.1).

Moreover, the local tourism organisation was set up based on the organisation of the Portuguese society of half a century ago. For instance, nowadays there is no such thing as a 'municipal doctor of medicine' but instead regional departments of the national health service. Also, the planning and management of the coastline is nowadays under the responsibility of the Ministry of the Environment and not of port authorities. In short, the legislation regulating the functioning of tourism at local level is outdated.

Furthermore, the planning of the local tourism resources is nowadays undertaken under the comprehensive town planning forms set up during the 1980s and 1990s (DL 208/82 and DL 69/90) (for an expanded analysis see section 5.2.2). Also, most of these organisations do not have either the scale or resources for effectively tackling the tourism problems at local level. For instance, the Algarve tourist board was established in the early 1970s because it was realized that the nine Tourism 'Juntas', by that time responsible for tourism in the region, were unable to address the tourism problems (see section 5.3.1).

Besides, tourism promotion should be implemented from an integrated regional approach rather than from a local point of view (for an expanded analysis see section 2.3.2 and 3.2.6). As is known, tourism activity is a regional phenomenon and therefore strategies must be set up under a broader perspective, such as in terms of itineraries, transportation networks, accommodation, multiplier effect, coordination among attractions, etc.

Yet, most of the problems affecting tourism at local level are also the concern of the local population. Thus, it seems that issues linked, for instance, with the preservation of the heritage; the development of leisure and recreation facilities, such as cinemas, festivals, sporting activities, etc; must be tackled not only from a tourism point of view but also in terms of the population that live in the area. In doing so, it is also likely that the utilization, and, thus, the profit, of the tourism equipment and infrastructure might be increased, and potential feelings of antagonism or even rejection of the tourism phenomenon may be avoided (for an expanded analysis see chapter 2).

This does not necessarily mean that there is no place for tourism at the local level, when evidence illustrating the opposite was introduced in section 3.2.6. To put it in a different way, what seems to be important is the creation of effective technical and financial support for those local authorities where the tourism development process places particular pressure on the local resources, instead of creating autonomous or quasi-autonomous local tourism departments which often bring more bureaucracy, costs, and conflicts with other local organisations (see for instance the case of Germany described in section 3.2.6 where local tourism organisations are in permanent conflict with local authorities). The establishment of local tourism plans and the

creation of partnerships and arms-length organisations involving both public and private sector organisations may also be viewed as another alternative to the present situation (for an expanded analysis see the case of the British local tourism organisation reported in section 3.2.6).

5.3.2.6 Role and importance of public, private and non-profit organisations within the Portuguese tourism sector

As described in the previous section the Portuguese tourism organisation incorporates three main levels: national, regional and local. It is at these three levels that private, public and non-profit organisations find their links to the tourism organisation.

Private sector organisations are linked to the national organisation through the NTC, since their representatives (e.g., rent-a-car, travel agencies, building industry, camping, hotels, spas, and unions) hold 25% of the NTC seats (see DL 234/87). However, because the NTC is an advisory agency to the STT (see section 5.3.2.5.2) there is no mechanism ensuring that their opinions may influence the decisions taken by the government. In addition to this, most of the meetings promoted by the NTC take place only once or twice a year and have also produced few practical results, a situation which is viewed as responsible for undermining the participation of private sector organisations at national level.

It is, however, at regional level that private sector organisations have stronger and more effective links to the tourism organisation. As illustrated by figure 5.27 a share of 25% of the regional tourism commission seats belong to the private sector. The regional commission being the body responsible for approving and supervising the activities developed by the boards it seems then that private sector organisations have practical ways to influence the decision-making and -taking process at regional level. Despite that, it is argued in Portugal that there is a wide gap between legislation and practice because most private sector organisations are not fully accepted by the other members since their representatives lack accountability and legitimacy; they represent small size organisations and thus have low lobbying capacity; and also because they are not contributors for the RTBs budget. It is the aim of this thesis to analyse whether these arguments are valid and to evaluate how effective and efficient the link of private sector organisations to RTBs is (see chapter 7).

As far as the local level is concerned the proportion of seats held by private sector organisations is even larger than at regional level (50% in the TJ, 40% in the MCT) (see Carvalho, 1988; pp. 199-203), a situation which makes them, at least in theory, a particularly strong influence on

decisions. However, it is argued again that as a result of their accountability, legitimacy, small size, etc, they are unable to influence decisions (see chapter 7 for an expanded discussion of these issues).

Conversely, it is observed that public sector organisations have a larger representation in the tourism organisation. At national level 71% of the NTC seats belong to public sector organisations (see DL 234/87), whereas at regional level up to 75% of the representatives come from the public sector (50% of municipalities and 25% of other public organisations - see figure 5.27). At local level, the situation is similar because both the Tourism 'Juntas' and the Municipal Commissions for Tourism are answerable to the local authorities. Based on this scenario it is argued in Portugal that the tourism organisation is controlled by public sector organisations while the government's discourse conveys the image that tourism is a private sector industry. The research conducted in Portugal will help to explain whether this claim is valid or not (see section 7.3.14).

As far as non-profit organisations are concerned what is observed in Portugal is that many improvements are yet to be introduced. Indeed, the report published by the WTO in 1980 (WTO, 1980) put forward evidence that most of the tourism policies implemented worldwide up to the 1980s had failed to take into account the social and environmental characteristics of destination areas. Since then tourism planning has evolved from economic considerations towards a more comprehensive, and inclusive, view of the system (for an expanded analysis see sections 2.3.2 and 2.4.2). The changes observed in the new organisational forms set up over the last fifteen years also underline this trend towards more inclusive and horizontal approaches (see section 3.3.6). Despite all this, what is observed in Portugal is the fact that organisations linked to social and environmental matters are still looking for a place within the tourism organisation.

For instance, 'culture' is represented at the national level, near the NTC, by the heritage and culture (government) departments. However, there is not a single (independent) non-profit organisation, such as associations of arts, theatres, traditional and modern dancing, traditional and modern music, etc. The same is also observed in terms of the environment. That is, although the environment is represented at national level by some public sector departments (e.g., national parks and environment) there is not a single (independent) non-profit organisation represented in the NTC (e.g., independent environmental groups).

With regard to 'society' the situation is even worse since there is not a single either public or non-profit organisation which can be included in this sphere, when it is widely known that tourism accelerates undesirable social side-effects, such as drugs, prostitution, changes on

language, demonstration effects, commercialization of arts, crafts, etc (see De Kadt, 1970; Mathieson and Wall, 1982). The situation observed at the lower levels of the Portuguese tourism organisation is similar because at local level the legislation does not even mention these matters since they were not relevant fifty years ago when the legislation was enacted; and at regional level few RTBs appoint organisations to deal with these matters. However, for the few cases observed in the sample collected in Portugal, chapter 7 provides a discussion evaluating their role, efficiency and effectiveness.

5.3.2.7 Tourism planning and policy

Most of the policies passed by the Portuguese government for the tourism sector up to the 1980s aimed to attract larger numbers of international travellers to the country and to support the expansion of the tourism industry, but always without interfering with the private sectors actions (MCT, 1991; p. 11). With the exception of the few planning strategies discussed in section 5.3.1 (i.e. plans implemented in the Estoril resort (1914), Fátima (1940s) and Algarve (1965)), any other relevant tourism planning strategies were implemented in the sector. Whenever and wherever necessary, tourism planning problems were approached within the town planning legislation passed in 1934 (see section 5.2.1).

However, it cannot be said that in this regard the Portuguese situation was very different to that of other countries. For instance, in Britain the tourism development process was also undertaken within town planning (see Heeley, 1981); yet, the report published by the WTO in 1980 (WTO, 1980) also illustrates that up to the 1980s the situation worldwide was similar to that of the Portuguese and British (for an expanded analysis see section 2.2.2 and 2.3.2).

It was only in the mid-1980s that, for the very first time, a National Tourism Plan was implemented in Portugal, which shows the growing sensitivity of the government to match the expansion of tourism with the availability of resources and the sustaining capacity of the destination areas.

In particular, it was observed that the lack of continuity in the planning strategies previously implemented in the Algarve led to a number of developments based on a short-run approach in which 'rapid and easy profit' became the rule. The mushrooming ribbon developments (e.g. Praia de Rocha), the destruction of typical fishing villages (e.g. Albufeira), the noise caused by night life activities (e.g. discos and pubs) near residential areas, the shortage of the water supply, the sewage contamination, the depopulation of the inland areas in detriment to increasingly congested coastal areas, and the loss of social, cultural and architectural identity are

among the many examples that may be given to describe the impact produced by a number of unplanned tourist developments in the Algarve region.

In addition to that, the government realized that the tourism industry had become excessively dependent on the seasonal 'sun-sea-sand' products offered by the Algarve and the Lisbon Coast, when other quality, and less seasonal, products could also be offered by other regions (e.g. the Green Coast, the Silver Coast, the Mountains and the Valleys) (for an expanded analysis see section 5.3.2.3). Besides, the Portuguese government understood that the economic model followed in the Algarve was likely to jeopardize its sustaining basis, as had happened in many other parts of the world (e.g. Southern Spain, Caribbean, etc) (for an expanded analysis see chapter section 2.3.2).

Bearing these issues in mind, and taking also into account the growing importance of tourism to the Portuguese economy (section 5.3.2.4), a National Tourism Plan was implemented in 1986-89 (SET, 1986). Among other policies, the plan created 'priority areas for tourism development' ('REATs' 'EDTs', and PDTs¹⁹), launched the basis for the development of rural tourism by stimulating the creation of several 'LEADER' groups, and set up several working groups responsible for the study of the tourism development process in the Mediterranean Algarve, in the ski/mountain area of Serra da Estrela, and in the Port wine region of Douro Valley. The results of such groups would, subsequently, lead to planning strategies for these regions.

Furthermore, a specific programme to fund new investment was also created ('SIFIT'). Finally, a White Paper for Tourism was published in 1991 (MCT, 1991), which sought to provide an analysis of the Portuguese tourism market and industry, and support decisions taken by public and private sector organisations.

However, the planning of tourism cannot be seen disassociated from other policies. Indeed, the tourism sector in Portugal has benefited from unprecedented socio-economic development and from important structural changes which are not often introduced so rapidly into a country. For instance, 1986 was the year of the Portuguese entry into the EEC, and since then several improvements have been introduced into the Portuguese economy. Such improvements have also been fueled by a higher internal political stability (the same political party governed the country for nine nonstop years); by a higher stability in the monetary market (the Portuguese Escudo has resisted several speculative actions within the ERM); by lower inflation rates

¹⁹ REAT - Região de Aproveitamento Turístico; ROT - Região de Ordenamento Turístico; EDT - Eixo de Desenvolvimento Turístico; PDT - Polo de Desenvolvimento Turístico.

(inflation is now below 4%); by higher stability of the international oil price; and by the devaluation of the US dollar.

Moreover, several state-owned companies have been privatized which has brought greater efficiency to their functioning and has boosted the development of a market approach in many others, according to the worldwide trend discussed in section 3.3.2. With the support of ERDF funds, the infrastructure and equipment have also been modernized. For instance, important improvements have been introduced in the main Portuguese airports (Lisbon, Oporto, Faro and Madeira); ports (e.g., Lisbon, Leixões, Aveiro); road networks (e.g. new roads and bridges); rail network; telecommunications; etc. Taking into account the need to adjust Portuguese legislation to the EU directives, new legislation geared towards urban, regional and environmental planning has been passed, which will improve the living standards in the urban and rural agglomerations.

With regard to tourism several improvements have also been introduced in recent years. For instance, new legislation regulating the functioning of travel agencies, hotels, gaming, and time-share accommodation was passed; new funding schemes became available ('SIFIT I' and 'SIFIT II'); new promotional campaigns were put forward; a national inventory of tourism resources was also carried out; several plans were implemented in areas of high tourism potential (e.g., the Algarve, the Port wine region and the Serra da Estrela mountain/ski area); several strategies seeking to diversify supply and to improve the quality of tourism products were launched; many Portuguese *pousadas* were modernized while others were built; and, finally, more resources have been channelled into education and training.

However, and despite the improvements achieved over recent years, it is observed that many things are yet to be done. For instance, despite the policies set up under the national tourism plan regarding domestic tourism, this area is still a big issue since few Portuguese can afford to take holidays (see section 5.3.2.2). Yet, from an economic point of view several shortcomings may be pointed out in the tourism evolution of the last 10 years (see section 5.3.2.4). Furthermore, despite all the strategies launched under the national plan the tourism development process is still excessively concentrated in some few periods of the year (see figure 5.7) as well as in some few parts of the territory (see section 5.3.2.3). Also the government has failed to periodically update the national plan. Last but not least, tourism is still working within an outdated organisational framework which is excessively centralized at national level (see section 5.3.2.5). The implementation of several regional tourism strategies (e.g. the Algarve, the Serra da Estrela, the Douro Valley, etc) and of the 1994-99 Regional Plan²⁰ (PDR, 1993) without a

²⁰ The 1994-99 Regional Plan is a policy approved by Brussels which establishes how the ERDF funds are to be applied in Portugal.

strong involvement of the RTBs, is evidence of how centralized tourism organisation in Portugal is.

5.4 Conclusion

This chapter has provided a discussion about the evolution of planning, tourism, and organisation in Portugal. It was seen that during the dictatorship (1926-74) Portugal became a centralized and autocratic country ruled by a group of core bureaucrats that assumed the full responsibility for all decisions. A number of duties which used to be undertaken by municipalities were transferred to the national organisation. The model then implemented in Portugal shows several similarities to Weber's bureaucratic model, since it introduced the idea of centralized and top-down decision-making and taking processes, in which the top is the ultimate authority whereas lower-order organisations act as conveyors of information and executors of policies. However, whilst in countries such as the USA and England Weber's model was set up with the objective of ensuring more rationality, discipline, higher production and optimization of resources, the objective of the Portuguese regime was more oriented towards social and political control.

The town and tourism planning system implemented during this period therefore reflect the centralized and autocratic model established by the dictatorship. The town planning system was based upon legislation passed in 1934 for the expansion of urban agglomerations with more than 2,500 inhabitants. The full control of the development process relied on a national ministry responsible for taking all decisions (Ministério das Obras Públicas). This legislation was also applied to control the development process in the first tourist resorts launched in Portugal, i.e. tourism planning was an activity undertaken within the town planning system. However, because most of the principles supporting the organisational and planning practice of this period were undermined by the shortcomings discussed in chapters 2 and 3, they proved to be inadequate to deal with tourism and town problems.

The situation which has emerged in Portugal since the 1974 Revolution has assumed a clear rupture with the philosophy implemented during the dictatorship. Instead of an autocratic and centralized state Portugal has evolved towards decentralization, more down-top approaches, higher flexibility and horizontal coordination of policies, and, more recently, towards the creation of autonomous or semi-autonomous administrative regions. In other words, the evolution observed in a number of countries towards decentralization, more flexible, coordinated and participatory approaches, etc, discussed in chapters 1, 2 and 3, has also been brought into the Portuguese administration and planning system.

It is within this scenario that the tourism sector has also evolved in Portugal. From a centralized philosophy adopted during the dictatorship in which the full development process was concentrated at national level, or left in the hands of private sector operators, the Portuguese tourism organisation has advanced towards decentralized organisations. Under the new philosophy tourism is considered from a coordinated viewpoint involving public and private sector organisations, which seek not only to maximize the economic benefits that might be created by the sector, but also to ensure that development is achieved in accordance with the uniqueness and sustaining capacity of each region, i.e. following the principles discussed in chapters 2 and 3. With regard to this a national tourism plan was passed, regional organisations were established and several regional tourism strategies have been implemented in areas of high tourism potential.

However, despite all the improvements introduced into the tourism planning system and administrative organisation over the recent past it is observed that many problems are still to be fully tackled, such as the excessive load of tourist flows in some few parts of the territory; low utilization of the tourism potential offered by less developed tourist regions; great dependency on forms of mass tourism; low levels of domestic tourism; etc. As far as the administrative structure is concerned the evolution of tourism in Portugal has been marked by the implementation of some decentralized ideals, represented in the tourist boards set up in the early 1980s, which, though based on some of the principles discussed before (e.g., decentralization, and horizontally coordinated policies) are viewed as ineffective and inefficient agencies unable to answer the tourism problems at regional level.

It is therefore the aim of this thesis to evaluate why such a decentralized philosophy, which follows, at least in theory, the trends discussed in the chapters 2 and 3, has failed to provide an effective framework capable of tackling the tourism problems at regional level. In addition to that it is also the aim of this thesis to explore whether and to what extent an organisational structure based on network principles may constitute an alternative to the present regional tourism organisation, as well as to assess whether networks offer potential for tackling the issues faced by the Portuguese regional tourism organisation - these are issues which the following chapters will attempt to address.

Chapter 6

Methodology

6.1 Introduction

It was shown in the previous chapters the way in which tourism, planning and organisations evolved up to the mid-1990s. It was seen that these concepts are changing permanently, since they follow transformations which occur in society. The fact that most of the ideas which supported tourism, planning and organisation are no longer valid to today's reality were discussed and, based on that, alternative approaches for the way in which the planning process and the organisational framework in which the planning activity is to be put forward in the future, were suggested.

This chapter will discuss, and summarize, the way in which the research process, which is reported in this thesis, was carried out. Accordingly, section 6.2 provides a summary of the main research questions, while the discussion that is presented in section 6.4 consists of a summary focussing on the main research steps which have been followed.

Since an important area covered by this thesis is associated with the relational analysis field, which is an area not familiar to many social scientists, the objective of section 6.4 is to provide a relatively expanded analysis of the characteristics and position of the research which has been conducted in this field, in terms of its origin, developments, level of scientific maturity, and main differences in relation to descriptive studies. In section 6.5 the results of the pilot which was carried out in Portugal are discussed, while section 6.6 draws on the way in which the two most important methods used to collect information in Portugal (interview-questionnaires and

postal questionnaires) were designed. Section 6.7 looks at the reasons which justify the selection of the four Portuguese sampling areas where the fieldwork was conducted.

The objective of section 6.8 is to examine the main techniques which have been used to data analyse the information collected during the fieldwork. It will be seen that, in comparison to other reports, this thesis provides a relatively expanded analysis of this theme, since the research which is reported here makes use of several methods (e.g., statistics descriptive, sociometric analysis, mathematical measures, content analysis and triangulation), and some of them were even designed specifically for this research (e.g., mathematical equations). Therefore, it seems that proper justification of their use is required. Finally, section 6.9 reviews some of the most important strengths and weaknesses of the research process which has been followed, and discusses some recommendations which may facilitate the work of researchers interested in conducting research into this field in the future.

6.2 Aims and objectives of the research

The discussion presented in chapters 1 to 4 has helped to demonstrate that the tourism phenomenon which many countries nowadays deal with has few similarities to the 'innocuous' leisure and recreation activities undertaken before the 1960s. The improvement of socio-economic living conditions, and in particular growing amounts of disposable income; and the successive technological advances introduced in aviation, the car industry, road infrastructure, rail networks, etc; have made the travel and tourism industry expand very rapidly. Tourism is already the world's third largest exporting sector, only behind crude petroleum/petroleum products and motor vehicles/parts/accessories (see WTO, 1994a, p. 2). As also shown in chapter two, the impact of tourism on the economic structure of countries is so important that nowadays many of them would hardly be able to survive without it, as a result of its impact on balance-of-payments, income, employment, investment and development.

The remarkable economic results which were produced by the rapid expansion of tourism in the 1960s and 1970s were received by many, including academics, practitioners, and politicians, with such an enthusiasm that the tourism sector was seen, during this phase, as a new sector the potential of which could solve the problems of a number of (principally developing) countries, not only in an economic sense but also in terms of environmental and social-cultural protection and enhancement ('advocacy platform'- see Jafari, 1990 in section 1.4). The response obtained from governments was no less enthusiastic, since a number of national governments decided to establish tourism ministries, secretaries of state for tourism and other national tourism organisations, whose activities sought to attract growing numbers of visitors to their countries (see section 3.2.6).

However, evidence from a number of (bad) tourist developments, launched principally during the early days of the tourism development process, has shown that the tourism sector is much more complex than was initially thought, and also, despite all its potential, tourism may, instead, lead destination areas to chaos, not only from an environmental and social point of view but also from an economic perspective (see section 2.3.2). As a result of this evidence the tourism approach has moved towards more cautionary ideas which take into account not only its economic capacity but also its potential to jeopardize the supporting environment ('cautionary platform' - see Jafari, 1990 in section 1.4). Such a belief has become so rooted in the tourism community that it has even been adopted in the official reports of highly representative tourism organisations and forums, such as the WTO, Manila Conference, and George Washington University Tourism Policy Forum. The need to find new directions, or even a new paradigm, for tourism has, therefore, become a top priority in the tourism sector (see section 2.4.2).

The central aim of this thesis is linked to the conviction that the success of tourism in the future depends on two main aspects: the first is the need to improve the way in which the planning process is carried out ('procedural component'); the second, is the need to pay more attention to the organisational framework in which planning is undertaken ('administrative component'), since, and although not taken into account by planners, that strongly affects the efficiency and effectiveness of planning activity.

In addition to these two main aims, there are two other main issues which are in the core of this research. The first is the need for governments to pay more attention to regional level organisations, since the success of the planning activity and the profitability of the tourism industry will increasingly depend on the efficiency and effectiveness of the planning and coordinating attitudes delivered by them ('regional component'); the second is the potential role which may be developed by networks in the improvement of tourism planning and in the coordination of the tourism sector ('network component').

Taking into account these central aims, the objectives of the thesis may be summed up as follows. To begin with, the thesis will attempt to examine (i) whether it may be argued that in spite of the emphasis put by governments on national level organisations, with the objective of attracting large numbers of visitors to their countries and benefit from the macro-economic effect produced by tourism (e.g., balance-of-payments, income and employment), they also have failed to consider the impact which such visitors may produce in the destination areas (e.g., economic, natural, and social), since, when they exist, most regional tourism organisations show little capacity to intervene efficiently and effectively in the tourism

development process; (ii) whether it is possible to say that tourism at the regional level is often viewed from a 'laissez-faire' point of view, since most of the work developed by the RTBs, whenever they exist, is geared towards marketing and promotion and, therefore, little attention is paid to planning and development areas.

The capacity of RTBs to work as coordinating agencies capable of bringing together the multiplicity of interests included in the tourism sector (public, private and non-profit organisations) will also be evaluated in this thesis. That is (iii) whether, and to what extent, RTBs have the capacity to coordinate the amalgam of organisations involved in the tourism industry; (iv) whether action taken by RTBs may prevent some of the negative social and environmental impacts produced by tourism; (v) whether closer cooperation among organisations may improve the economic impact created by tourism and in particular the tourism multiplier effect; and (vi) whether closer coordination among organisations may lead to more participatory, democratic, comprehensive and informed decisions, will be examined.

Furthermore, (vii) whether it is valid to argue that the traditional model in which most tourism boards operate ('Weber's bureaucratic model') is no longer suited to the way in which RTBs should operate, will be assessed. With regard to this, (viii) how the organisations associated with the tourism sector react to top-down approaches, in which boards are responsible for setting up policies and strategies while their role is only to endorse policies put forward by the boards, will be examined; (ix) the willingness of tourism participants in getting involved in the decision-making and -taking process, instead of working as spectators of the policies set up by the boards; and (x) how organisations react to situations in which almost the full power rely both on tourism boards as well as on few professionals, will be assessed.

Moreover, (xi) whether an alternative organisational framework based on the network philosophy can help to improve the functioning of tourism at regional level; (xii) the strengths and weaknesses which may be expected from their functioning; and (xiii) the possibility of putting into practice this type of administrative framework, will be discussed .

In addition to all the above (xiv) the way in which tourism planning has evolved up to the mid-1990s; (xv) the reasons which have prompted its evolution; (xvi) the efficiency and effectiveness of the planning approaches which have been adopted by tourism planners to tackle the problems produced by the tourism industry; (xvii) why it is claimed in literature that tourism planning demands a new approach, or even a new paradigm, if the tourism sector is to develop without jeopardizing the surrounding environment whilst maximising its potential; (xviii) and ways in which the planning process may be improved in the future, are also examined.

As far as the discussion of tourism planning is concerned this thesis will also attempt to demonstrate that (xix) the foundations of tourism and urban and regional planning show a great level of similarity, and, therefore, (xx) tourism planning will most benefit if it is developed in close proximity to urban and regional planning.

The two final main objectives which are proposed in this thesis are (xxi) to look at the way in which tourism planning has evolved in Portugal, and (xxii) to discuss ways in which it may be improved in the future.

6.3 The research process

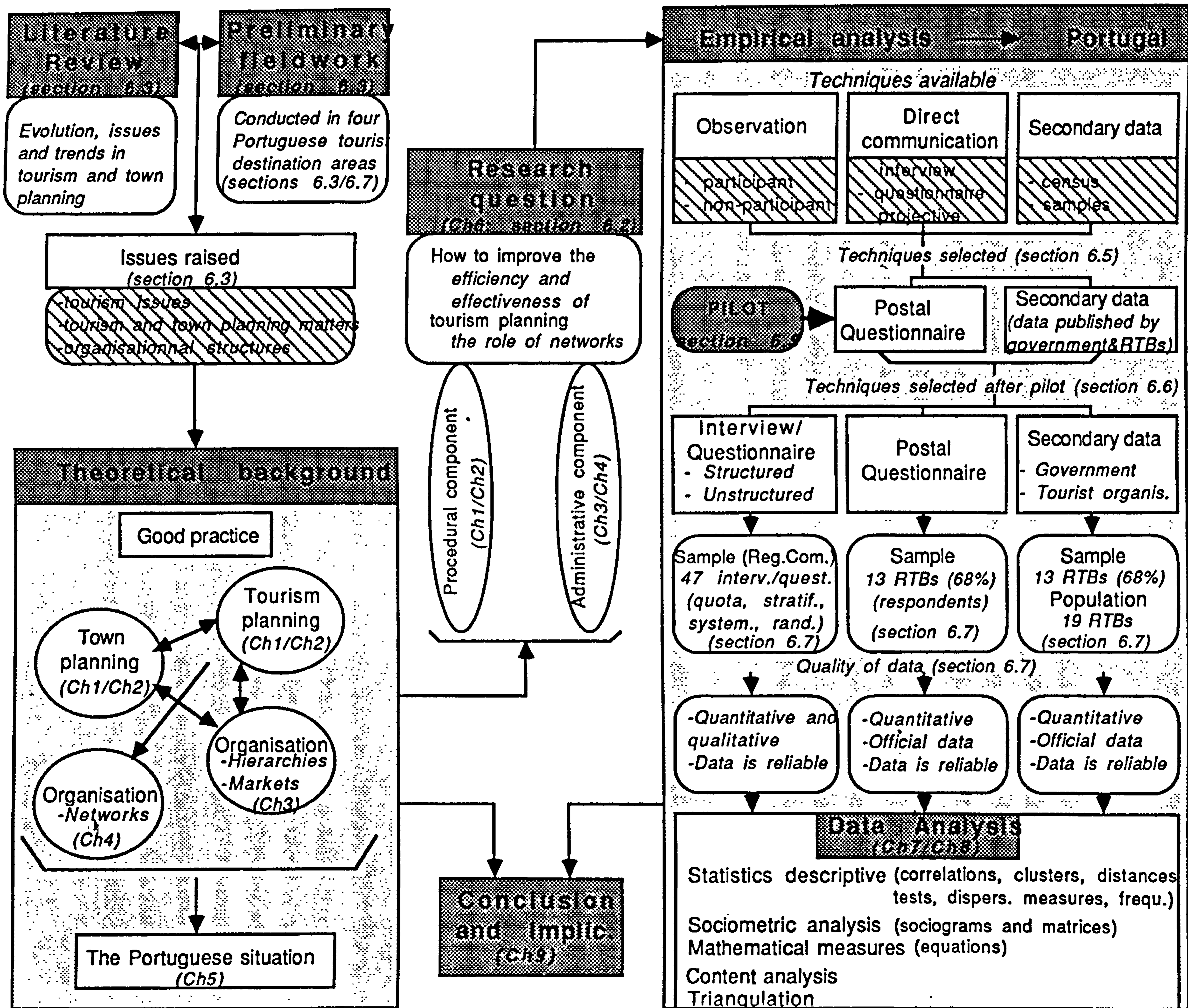
After having examined the aims and objectives of this thesis it is important to discuss briefly now some of the most important steps which have been followed in this research (see figure 6.1).

As pointed out in the previous section, the tourism phenomenon with which nowadays many countries have to deal, has few similarities with the short range movement of people typical of the period prior to the rapid tourism expansion of the 1960s and 1970s (see section 2.2.2). It has been illustrated that it was since the 1960s and 1970s that tourism started to expand very rapidly, and it has also been shown how that changed the face of many areas of high tourism potential, since tourism development has not always been supported by adjusted planning strategies (see section 2.3.2).

Hence, tourism has been responsible for causing chaos in many areas, not only from an environmental and social point of view but also from an economic perspective. In addition to that, specialized literature provides evidence which shows that in the few places where plans were set up, with the objective of stimulating a symbiotic relationship between tourism and the supporting environment, many of them were not implemented or failed to lead anywhere (see sections 2.3.2 and 2.4.2). As a result of this, tourism literature and international institutions associated with the tourism sector sought alternative planning approaches capable of tackling efficiently and effectively the problems produced by tourism and improving the benefits which are produced by the tourism industry.

It was based on this assumption that the first research objectives for this thesis were designed. In the first phase it was thought that research conducted into the analysis of tourism planning theory and practice, matched against the recent developments which have been achieved in urban and regional planning and with the feed-back produced by agencies which deal daily with

Figure 6.1 - The research process



tourism problems, could bring about new ideas capable of leading to the improvement of tourism planning theory and practice. Therefore, the first step followed in this research comprised an extensive literature review of the evolution and trends of tourism and town planning theory and practice, in order to disclose ways in which tourism planning could be improved in the future ('procedural component') (see figure 6.1).

However, as a result of preliminary fieldwork conducted in Portugal in four sampling areas (the Algarve, the Rota da Luz, the Alto Minho and the Estoril Coast - see also section 6.7), in a total of 12 semi-structured interviews focussing on the position, strengths and weaknesses of the Portuguese regional tourism administration, it was found that in spite of the great importance of these matters (i.e. 'procedural component'), many of the problems with which the tourism industry is faced are also linked to the organisational framework in which the planning process is carried out ('administrative component'). That is, in addition to the tourism issues which the tourism administration has to deal with, 'procedural issues' and 'administrative issues' are viewed as areas which most critically affect the efficiency and effectiveness of the way in which tourism planning and the tourism industry operate (see figure 6.1).

Taking into account the initial objectives of this thesis, and the outcomes which emerged from the preliminary fieldwork, a theoretical background comprising three main key areas was then built: characteristics and requirements of the tourism industry (chapters 1 and 2); planning styles which ought to be implemented in the future in order to improve the efficiency and effectiveness of tourism planning (chapters 1 and 2); and organisational structures which may support the implementation of modern forms of planning, the development of sustaining forms of tourism, and the expansion of a profitable tourism industry (Chapters 3 and 4) (see figure 6.1).

It was according to this theoretical framework of reference that a first insight was gained into the Portuguese situation, with the objective of identifying the main issues affecting the functioning of the tourism sector; the planning forms which have supported the expansion of tourism; and the organisational framework which supports the tourism administration. Since the socio-economic and political conditions which have guided the tourism development process in Portugal are substantially different from those which have marked the pace of development in other countries, it was found that the Portuguese situation (chapter 5) should be discussed separately from the general discussion brought about by other parts of the thesis (chapters 1 to 4).

After having established the framework which provided the theory on which is based, the research moved to methodological issues, as is illustrated by the top central and right hand side

parts of figure 6.1. The top central box of the chart shows that the research objective may be summed up as follows (for an expanded analysis see section 6.2): to study the efficiency and effectiveness of tourism planning from a procedural and administrative point of view, as well as to evaluate the role which may be developed by networks in the improvement of both planning practice and the functioning of the tourism industry.

The box in the right hand side of figure 6.1 shows the type of methods and techniques which were selected to analyse the research problems (see section 6.2), and for which an expanded analysis is introduced in the following sections. As will be seen further several issues rather familiar to social scientists (descriptive analysis), as well as other less common matters which may be grouped into the what is usually labelled in social science as 'sociometric' or 'relational' analysis, are raised.

As a result of the variety and complexity of problems discussed the data collection process also had to involve several different methods to gather information (i.e. interview-questionnaires, postal questionnaires and secondary data) as well as a diversity of techniques to analyse data (i.e. statistics descriptive, content analysis, sociometric techniques, mathematical equations, and triangulation). The results of the fieldwork conducted in Portugal are presented in chapters 7 and 8, while, taking into account the theoretical framework brought about by chapters 1 to 4, the implications of such results both to the field and to the Portuguese situation are examined in chapter 9.

6.4 Descriptive analysis vs. network or sociometric analysis

It was shown in sections 6.2 and 6.3 that in addition to the study of the ways in which tourism planning may be improved in the future ('procedural component'), the second central objective which is proposed is to examine the efficiency and effectiveness of regional tourism administration ('administrative component') (see also figure 6.1). However, the study of the way in which organisations operate as well as the characteristics of the web of relationships which is created by them and the surrounding environment is only possible through the use of specific techniques, labelled in social science as 'sociometric', or 'relational' analysis.

Since the vast majority of researchers are more used to working with descriptive rather than with sociometric analysis, what is proposed in this section is to provide an insight into the main characteristics of relational analysis, in terms of its objectives, type of studies, origin, developments, and sources of information. Further sections will discuss the methods which may be chosen by social scientists to analyse sociometric information (see section 6.8). It is

hoped that at the end of the section this field will no longer be unfriendly to other scientists who wish to carry out research into this area. Finally, it should also be pointed out that while this section provides a first, and general, insight into the mechanics of sociometric studies, sections 6.5 and 6.6. will show how this technique may be applied specifically to the tourism field.

A good share of the social science studies focuses on individuals, who are often studied in terms of demographics (e.g., age, gender, etc), socioeconomic characteristics (e.g., income, education, race), preferences (e.g., products they like most), etc. In addition to this, many issues in social sciences are analysed from the point of view of individuals (e.g., perception of environmental problems, political decisions, international conflicts, etc). That is, a great share of the social science research focuses either on individuals or on their perception of particular matters.

Despite the fact that some purely descriptive social research is often supplanted by analytical research focussing on the way in which different groups of people feel or behave, in the end the research process follows a similar approach to that described before, since, in most situations, groups are studied from the perspective of individuals and, therefore, it is the 'individual' who remains the unit of analysis (Coleman, 1978; p. 75). As a result of that, *questions are asked to individuals as separate and independent analysis. The very techniques mirror this well: samples are random, never including (except by accident) two persons who are friends; interviews are with one individual, as an atomistic entity, and responses are coded onto separate cases, one for each person* (Denzin, 1970; p. 115; Coleman, 1978; pp. 75/6) (for an expanded analysis see Knoke and Kuklinski, 1982, pp. 5, 10; Emerson, 1976, pp. 335-6; Coleman, 1978, pp. 75-6; Benson, 1978, p. 69; Hall et al, 1977, p. 457; and Litwack and Hylton, 1961/62, pp. 395-6).

In opposition to the atomistic way in which many issues are studied some social scientists have drawn attention to the interconnected relationship in which a number of phenomena are supported, which, as shown previously, is one of the objectives that is proposed in this thesis; i.e., to examine the organisational framework which supports the functioning of tourism boards. Indeed, despite the potential offered by individualistic approaches to provide in-depth insights into the characteristics and beliefs of individuals, some phenomena must, instead, be studied in an interconnected way, since they result from social interaction rather than from 'isolated' behaviour. According to Tjosvold (1986; p. 517) *interdependence pervades organisations and is fundamental to understanding them. Individuals within a work group, work groups within departments, and departments within organisations all depend upon each other. Even persons who work independently at their own job typically require others to provide information and supplies to complete their work.*

Network analysis is the field of social sciences which provide the theory for the study of the relationships established among individuals, groups of individuals and organisations (Wasserman and Faust, 1994, pp. 3-5; Stokowski, 1994, p. 59; Miller, 1991; Knoke, 1990; Knoke and Kuklinski, 1983, p. 5; Denzin, 1970, p. 117). Network analysis, or, as labelled by others, 'sociometric analysis', sees *an individual interview as part of some larger structure in which the respondent finds himself his network of friends, the shop or office where he works, the bowling team he belongs to, and so on* (Denzin, 1970; p. 117). Therefore, *the fundamental difference between a social network explanation and a non-network explanation of a process is the inclusion of concepts and information on 'relationships' among units in a study* (Wasserman and Faust, 1994; p. 6).

Data collected by sociometric analysis includes, therefore, information which describes the way in which individuals interact with their surrounding environment; that is, information is gathered by 'relational type' questions, which seek to find out who are the individual best friends; his subordinates; his favourite restaurants; the libraries he often goes to; the people he is tied to; the extent of the relationship with some groups; why he easily communicates with some groups whereas he conflicts with others; etc. That is, *the unit of analysis in network analysis is not the individual, but an entity consisting of a collection of individuals and the linkages among them. Network methods focus on dyads (two actors and their ties), triads (three actors and their ties), or larger systems (subgroups of individuals, or entire networks)* (Wasserman and Faust, 1994, p.5). Therefore, *the primary analytic focus is on the relational connections as such - the ties among the positions - and not on the attributes of the incumbent individuals who occupy these positions* (Knoke, 1990, p. 8). In short, the objective of sociometric analysis is to map out and explain the network of relationships created by individuals. As will be seen later, this field offers great potential to tourism since it allows understanding of how tourism organisations connect with each other; how policies are coordinated; the extent and characteristics of the relationships established among tourism and non-tourism organisations; the influence they develop over each other; why tourism administration is led by some few prominent organisations, etc (see chapters 7 and 8).

Therefore, the field embraced by sociometric analysis is best able to analyse the issues which are the core of this thesis. As described previously (see sections 6.2 and 6.3), more than to describe the characteristics of the actors responsible for tourism at regional level, the purpose is to examine how, why and for what reason regional tourism actors interlock with each other, and how such interlocking may be strengthened in future. In other words, most questions are relational rather than analytical.

The origin of the network analysis theory may be traced back in the 1960s and 1970s, since up to the 1960s most of the research and theory applied to this area was in a disappointingly scale (Kenis and Schneider, 1991, p. 27; Stringer, 1967, p. 105) (see also section 4.2). However, some few exceptions may be cited: indirect references to network analysis may be found in the discussion provided by Durkheim about the origin of the organic society (see section 3.2.1), and, in a tangential way, in Marx's analysis of class (for an expanded analysis see Thomas, 1957, p. 347; Litwack and Hylton, 1961/62, p. 396).

It was, nevertheless, in the mid-1950s that, according to Kenis and Schneider (1991; pp. 27-33), Emerson (1976; p. 335), Benson (1975; p. 69) and Stringer (1957; pp. 105-6, 117-8), a distinct approach to network analysis emerged as a result of the work published, among others, by Ward, McCloskey and Trefethan, Homans, Thibaut and Kelly, Blau and Mill. Stringer and Emerson argue that up to the mid-1970s there was an enormous expansion of the research in this field; however, most scientific developments were characterized by containing a wide diversity of approaches and for sparking controversy.

Despite the attempts made up to the 1980s to develop a general theoretical framework for this area, embracing most of the, as labelled by Zeitz, *provocative theoretical perspectives* which meanwhile had emerged in the field (e.g., exchange theory, ecological theory, systems theory, sociometry, network analysis and political economy), most research in network analysis was undermined by differentiated approaches lacking a mainstream theory (Zeitz, 1980; p. 72).

However, since the early 1980s the network analysis theory has started to expand as the result of several events which happened in society such as Reaganism, Thatcherism, the collapse of the welfare state, the end of the Cold War, etc (for an expanded analysis see chapter 3). As a result of that, a good share of the research conducted into this field has moved from studies primarily concerned with locating and describing relationships of individuals within society, to the study of the relationships established among organisations. As pointed out by Burt (1980; p. 332), the single most important point distinguishing these developments in network analysis from the earlier 'psychological work' is a new emphasis put on 'structural equivalence' rather than on cohesion.

In other words, despite the fact that up to the 1970s *there was a tardy development of network analysis in the public sector field due to the slowness of public bodies to adopt new ideas* (Stringer, 1970; p. 106), *the real take-off of network studies (in public policy making) occurred in the decade following* (i.e., during the 1980s) on account of new ideas brought into society, such as 'the fluid perspective', 'decentralization', 'informality', 'pluralism', 'horizontal relationships between governmental organisations and organised interests', etc (Kenis and

Schneider, 1991; p. 27). An increasingly awareness that *organisations cannot and do not work independently (since) they are intrinsically connected with each other* (Tjosvold, 1986; p. 518), has led the inter-organisational analysis theory to emerge as *a fundamental unit of analysis in the study of advanced ... society* (Benson, 1978; p. 69).

As pointed out by Wasserman and Faust (1994; pp. xxix-xxx), not surprisingly *the last decade has seen the publication of several books and edited volumes dealing with aspects of social network theory, application, and method*. In particular *the theoretical basis for the network perspective has been extensively outlined in books by Berkovitz (1982) and Burt (1982)*. (...) *In addition, there are several collections of papers that apply network ideas to substantive research problems (Leinhardt, 1977; Holland and Leinhardt, 1979; Marsden and Lin, 1982; Wellman and Berkovitz, 1988; Breiger, 1990a; Hiramatsu, 1990; Weesie and Flap, 1990; Wasserman and Galaskiewicz, 1994)*. Other books *have presented collections of readings on special topics in network methods (e.g., Burt and Minor, 1983), on current methodological advances (e.g., Freeman et al 1989), on elementary discussions of basic topics in network analysis (e.g., Knoke and Kuklinsky, 1982; Scott, 1992); and there are also a number of monographs and articles reviewing network methodology (Nortway, 1952; Lindzey and Borgatta, 1954; Mitchell, 1974; Roistacher, 1974; Freeman, 1976; Burt, 1978; Feger et al 1978; Klovdahl, 1979; Niesmoller and Schijf, 1980; Burt, 1980; Alba, 1981; Frank, 1981; Wellman, 1988a; Wellman and Berkovitz, 1988; Marsden, 1990b)*. *Very recently, a number of books have begun to appear, discussing advanced methodological topics. Hage and Harary (1983) is a good example of this genre; Boyd (1990), Breiger (1991) and Pattison (1993) introduce the reader to other specialized topics.*

Furthermore, the publication of books and the edition of volumes focussing on sociometric methods and techniques (e.g., Wasserman and Faust, 1994; Burt and Minor, 1983; Knoke and Kuklinski, 1982), have also attracted the attention of a number of outsiders who have increasingly become sensitive to the potential offered by this field. Also, the publication of two specialized journals in networks analysis ('Social Networks' and 'Connections'), and a growing number of articles published in several widely quoted journals (e.g., 'Administrative Science Quarterly', 'American Journal of Sociology', 'Human Relations', 'American Sociological Review', and 'Annual Review of Sociology') bring evidence of the rapid expansion of the network analysis theory and practice over the last fifteen years.

Among the matters which have most attracted the attention of researchers particular reference can be made to several topics which, directly or indirectly, will be discussed in this thesis, such as organisational interdependence, isomorphism, contagion, mimetism, and adaptation (e.g., Galaskiewicz and Wasserman, 1989; Galaskiewicz and Burt, 1991; Oliver, 1988; Miller and

Friesen, 1980; Aiken and Hage, 1968); centrality (e.g., prominence, prestige, peripherally and anonymity) (e.g., Wasserman and Faust, 1994; Knoke and Burt, 1983); control and power in network of organisations (e.g., Minett, 1992; Krackhardt, 1990; Ouchi, 1977); the effect of interorganisational coordination on the exchange of information among organisations and on innovation (e.g., Sproull and Kiesler, 1991; Fulk and Steinfield, 1990; Hall et al, 1977; Trushman, 1977); and conflicts arising from the interconnecting relationships established among organisations (e.g., Renzetti and Lee, 1993; Kochan et al, 1975).

In opposition to the study of particular issues resulting from the interaction established among organisations, there are also a number of studies where the emphasis is put, instead, into broader analysis and descriptions of the social environments in which networking relationships may emerge. In this context, actor attributes and behaviours are explained in terms of the structure of the relations in which they occur (e.g., Knoke, 1990; Burt and Minor, 1983; Burt and Minor, 1983); this is the case of the study of policy networks created in several domains such as in the telecommunications field (e.g., Schneider and Werle, 1991), in the High-T_C field (e.g., Jansen, 1991), in central banks and other financial groups (e.g., Rusterholz, 1985; Cuyvers and Meeusen, 1985; Swartz, 1985; Scott and Griff, 1985; Coleman, 1991), in health policy (e.g., Döhler, 1991), and in industrial restructuring (e.g., Kenis, 1991). The book published by Stokowski (1994), entitled 'Leisure in Society: A Network Structural Perspective', and a paper focussing on the tourism administration of the Catalonia region (see Pearce, forthcoming), are amongst the few references which may be cited in the leisure field.

Nevertheless, and according to Wasserman and Faust (1994, pp. 5-6) and Stokowski (1994, p. 58), the network perspective has proved important to many other disciplines, since many topics that have traditionally interested social scientists can be thought of in relational or social analytical terms, such as occupational mobility; the impact of urbanization on individual well-being; the world political and economic system; community elite decision making; social support; community group problem solving; belief systems; cognition or social perception; markets; sociology of science; consensus and social influence; coalition formation; biology; physics; transportation; mathematics; etc.

6.5 The pilot (postal questionnaire and secondary data)

Taking into account the research objectives of this thesis (see section 6.2) a first questionnaire (pilot) was then designed in order to afford an insight into the characteristics of the organisational framework which supports the functioning of regional tourism administration (see Appendix I). Whereas the books published by Wasserman and Faust (1994), Knoke and

Kuklinski (1982) and Burt and Minor (1983) provided broad, and useful, guidelines for the structure and contents of the questionnaire, the articles published by Hall et al (1978) and Schmidt and Kochan (1977) supplied important practical ways in which some of the issues concerning the interconnecting relationships established among organisations may be researched. Therefore, some of the issues discussed by these researchers were brought into the questionnaire.

The questionnaire was structured into three main parts: part I contains a set of questions which aim to analyse and describe the characteristics of the organisations responsible for the Portuguese regional tourism organisation (descriptive analysis); part II includes a group of questions which focuses on the nature and characteristics of the interlocking established among those organisations (sociometric analysis); finally, part III includes a group of questions which attempt to assess whether regional tourism organisations would be willing to join an alternative administrative framework based on a network philosophy, as well as their perception of the advantages and disadvantages offered by this type of organisation (exploratory analysis).

The questionnaire was later tested on a Portuguese regional tourism board (Rota da Luz RTB - see map 5.6). Taking into account the structure of the Portuguese regional tourism commissions (see figure 5.27), eight questionnaires were posted to organisations which represent all the interests included in the tourism boards, namely private sector organisations (representatives of rent-a-car, camping and travel agents associations); public sector organisations (representatives of the sports institute and University of Aveiro); municipalities (vice-presidents of Estarreja and Ovar); and the president of the Rota da Luz tourism board. The results produced by the pilot are as follows.

As discussed before, the first part of the questionnaire includes questions which attempt to gather information about the characteristics of the organisations included in the tourism boards (descriptive analysis), such as number of employees, budget, length of operation, spatial coverage, nature, objectives, whether the organisation includes representatives of other organisations, etc. This part was fully and easily answered by all respondents. It was, nevertheless, observed that while some respondents provided expanded answers about their organisations (e.g., Q8 and Q9), others provided, instead, brief characterizations of the same matters; this situation was seen as having the potential to bring further problems in terms of data analysis, since the comparison among different organisations could be based on different amounts of information which could lead to different, and thus biased, interpretations of the results.

In order to solve this problem two solutions were then found: either these questions would have to be completely closed (a situation which would waste useful information provided by the respondents), or the questionnaire would have to assume a different format. It was then realized that, alternatively to the use of a postal questionnaire, the use of an 'interview-questionnaire' could help both to standardize the answers and help to collect other useful information provided by the respondents. Since other problems were further observed (e.g., low motivation to answer the questionnaire; the need to expand some arguments; and difficulty in understanding some questions), it was realized that the use of an interview-questionnaire would lead to better results than a questionnaire. The paragraphs which follows will show that despite the potential offered by postal questionnaires in descriptive analysis, they also show several critical limitations when applied to relational studies.

In fact, it was in the second part of the questionnaire ('sociometric analysis') that a number of problems started to emerge. Despite the fact that individuals easily answer questionnaires in which questions are presented under a descriptive format (e.g., questions about age, gender, socioeconomic characteristics, preferences, etc), it was found that relational questions are much more difficult to understand. It was seen that most respondents saw the questionnaire from an individual point of view rather than as representatives of their organisations, a situation which, to a certain extent, biased some answers. In addition to that, it was later observed that the presence of an interviewer near the respondents assumed an important role in this type of research (sociometric analysis), since it is possible to explain what is sought by each question and, therefore, avoid misinterpretations and biased results.

Another problem which emerged from the questionnaire is linked to the fact that sociometric analysis implies the use of (often long) lists of organisations (see Questionnaire I - Appendix I). It was observed that when looking at these lists most respondents get bored, lose concentration, and, when questionnaires are returned, it is found that some questions are not fully answered, and some of them are even contradictory, which leads to biased results.

Despite the fact that some direct contacts (e.g., personal and telephone) were initially established with the selected panel to explain what was meant by each question; the relationship between the questions and the lists attached to the questionnaire; it was, nevertheless, observed that most actors neither understood nor paid enough attention to such explanations. It was then realized that the use of introductory information placed at the beginning of the questionnaire would lead to worse results, since, and as widely known, in the face of such introductory notes, most people either do not read them or go so rapidly through them, which make them useless for conveying complex messages.

For instance, it was observed that several respondents did not understand the relationship between the list provided by Table I (see Appendix I) and the code numbers placed in front of the questions. As a result, some of them gave up answering the questionnaire after starting Part II, and, always very politely, argued that the questionnaire was too long and also that they were too busy to answer it.

In addition to this it was also found that many respondents were not willing to answer some of the questions included in Part II. That is, although argued in network analysis literature that questions focussing on conflict (Q21, Q22, Q23), tension (Q19), and interference (Q20) may help to detect obstacles to the creation of closer relationships among organisations, it was also found that such questions are very sensitive, and may even be seen as rude, and, thus, are rarely answered. Besides, several situations were even noticed in which such questions helped to create a climate of suspicion about the objective of the questionnaire, and, as a result of that, the respondents stopped answering it.

However, it was observed later that when these sensitive matters are informally discussed at the end of the interview when a closer and warmer relationship between the interviewer and the respondent emerges, useful information about these issues may be collected. Such a situation drew attention to the importance of including some open-ended questions at the end of the questionnaire in order to examine sensitive matters. It was also found that such information could be further viewed as anecdotal data and analysed according to some of the useful methods developed by Renzetti and Lee (1993) in their book entitled 'Researching Sensitive Topics'.

Another important issue which emerged from Part II is linked to questions focussing on the perception of other organisations. Again, although it is argued in network analysis literature that questions linked to perception and performance of other organisations (Q28), competence of personnel (Q30) and quality of communication (Q29) are important in the sense that they indirectly measure the willingness of an organisation to get involved with other organisations, two main problems were, nevertheless, found. First, in situations characterized by little interlocking respondents may not have a clear picture about the way in which other agencies operate. Second, it was found that there are situations in which respondents are reluctant to comment on the operating philosophy and operating styles of other organisations, since such comments are viewed as arrogant, pretentious, and an interference in the work developed by other organisations.

For instance, although the panel was asked whether their organisations were 'more', 'less' or 'similarly' powerful than other organisations (Q26), no answers whatsoever were obtained from this question. That is, even in situations in which a respondent finds his organisation

more powerful than another one, he is not willing to state it. It was then, and again, realized that the only way to collect information about sensitive issues is by the use of either indirect or open-ended questions. Bearing this in mind, it was, once more, concluded that the questionnaire should include some open-ended questions in order to gather information on this issue as well as on the other sensitive topics discussed before.

Apart from these shortcomings it was found that all the other questions included in Part II of the questionnaire were fully and easily understood by all respondents. For instance, it was observed that questions focussing on the frequency of contact (Q10), method of contact (Q11), reason for contact (Q12), basis of contact (Q13), terms of contact (Q14), influence of contact (Q15), importance of contact (Q16), benefits of contact (Q17), importance of the other organisations for tourism (Q18), compatibility of goals and operating philosophies (Q24, Q27), and coordination (Q25), were easily understood and promptly answered by all respondents. Nevertheless, it was observed that some confusion arose between Q24 and Q27, since, despite the fact that some research in network analysis do split matters linked to compatibility of goals and compatibility of operating philosophies (e.g., Hall et al, 1978; Schmidt and Kochan, 1977), most respondents proved incapable of distinguishing between them, and, therefore, it was decided to merge both questions into a single one.

As far as Part III is concerned, it was seen that all questions were easily understood and fully answered by all respondents. Even so, the following (minor) problems were observed. Firstly, most respondents were not willing to answer some questions under a five point scale ('Likert scale', i.e. from 'strongly agree', to 'strongly disagree') (see Q36 to Q43). Evidence shows that because most answers tend to fall into three options (i.e. 'agree', 'neither agree nor disagree', and 'disagree'), then, and in such situations, a three point scale must be used instead. Secondly, the alternation of positive and negative statements may create some misunderstandings, because some respondents answer questions very rapidly and, therefore, may not realize whether a statement is an affirmation or not. Such a situation may, nevertheless, be overcome whenever questionnaires are conducted by interviewers (interview-questionnaire), and, under such circumstances, the variety of situations provided by such statements may push respondents to higher levels of concentration and, also, to more accurate results.

Finally, some other additional minor problems were observed in the questionnaire. To begin with, it was found that particular care had to be taken whenever translating a questionnaire from one language to another; that is, even in situations in which the researcher is a native speaker the questionnaire must always be double-checked by other native speakers, in order to avoid some unnecessary misinterpretations as happened during this research. Also, particular attention must be paid to the use of scales, since they are often used randomly (for instance '1'

might mean 'strongly agree' or 'strongly disagree') but in some countries their use is standard and, thus, they must be used accordingly.

As far as the secondary information is concerned it was found that there is a wide range of information available not only in Portugal but also abroad, which is useful for examining some of the issues of this thesis (see section 6.2). For instance, data published by international institutions, such as the WTO, the OECD and the World Bank, provide important indicators about world tourism trends, and allow comparisons among different countries. Furthermore, information which is published by the Portuguese government and other Portuguese institutions (e.g., tourism boards, National Institute of Statistics, Department of the Environment, etc) allows insights into important issues which are discussed, such as the way in which national and international tourism has evolved in Portugal; the economics of the Portuguese tourism sector; the economics of the Portuguese regional tourism administration; the spatial distribution of tourism flows in Portugal; and the characteristics of the Portuguese tourism boards.

Since the information published by international institutions and the Portuguese government are available for public use, no major problems were detected both in collecting and in analysing this type of data. However, the same cannot be said in relation to some of the information available in the Portuguese tourism boards (e.g., amounts of tourism VAT collected within their areas). That is, because tourism is an emerging field in Portugal and most tourism boards are not often contacted by researchers, so they showed difficulty in deciding whether some of the information available could be utilized for public use. However, after having insisted and explained the type of use to which the information would be put, the data was finally disclosed. However, those interested in conducting research in Portugal focussing on regional tourism administration should expect some difficulties in gaining access to information available in the RTBs.

6.6 Techniques used to collect information (the interview-questionnaire, the postal questionnaire, and secondary information)

Figure 6.1 shows that as a result of the pilot which was conducted in Portugal, it was decided to select three main methods to collect information: interview-questionnaires; postal questionnaires and secondary information. Since the largest amount of information presented in this thesis has been collected by interview-questionnaires, and most of the problems which occurred during the pilot were also linked to the way in which questionnaires should be designed, then most of the discussion which is presented in this section is also linked to the way in which the questionnaires were designed.

As far as the questionnaires are concerned, the outcome which was produced by the pilot led to the introduction of several changes into their structure. Whereas some parts of the questionnaire were redesigned both in terms of content and format, other groups of questions were, for the first time, brought into the research (see Appendix II). The first decision which was taken was to replace the 'postal questionnaire' by an 'interview-questionnaire', due to the following reasons. First and foremost, the rate of response could be improved in particular among interviewees with problems in answering questionnaires. Also, different interpretations of the same questions could be avoided. Furthermore, an interview affords insights into sensitive issues, since the interviewer may always notice whether, and to what extent, such questions may be asked to the interviewees. Besides, interview-questionnaires have proved more powerful than questionnaires in research processes which deal with relational questions. Finally, an interview allows the inclusion of open-ended questions as well as the collection of 'spontaneous' information which emerges from the interaction established between the interviewer and the interviewee.

The second most important change introduced into the research was, as discussed in the previous section, the need to avoid sensitive issues. Accordingly, seven questions about conflict (Q19, Q20, Q21, Q23), perception (Q28, Q29, Q30), and power (Q26) were removed from the questionnaire (see pilot). Only a question focussing on conflict (Q22) was kept in the questionnaire, but, whenever asked, it was always explained to the interviewees that this subject was optional and also that it should be viewed from a technical rather than on a personal basis. Evidence would show further that, after introducing the question in such terms, high levels of 'complicity' may be reached between the interviewer and the interviewees, and the analysis of such items may no longer be a big issue.

Since the questionnaire was substantially reduced in the second part, and also because within the format of an interview-questionnaire questions are answered more rapidly, because some of the problems detected during the pilot are easily overcome (e.g., the interviewees do not have to spend so much time trying to understand the relationship between questions and lists of organisations; because relational questions are more difficult to understand the interviewer may help the respondents to interpret questions; whenever a sensitive issue is raised the interviewer may explain what is meant by the question and avoid misinterpretations, delays and misunderstandings), it was decided to include two additional groups of questions. A first which includes subjects linked to the profile of the individuals responsible for tourism at regional level, such as age, gender, education, how they are appointed to the tourism boards and for how long they stay there. The reason why this group of questions was included in the questionnaire is linked to the fact that some descriptive information helps to understand the type

of relationships established among organisations. The importance of the descriptive information discussed in section 7.2 to explain some of the relational issues examined in section 7.3 is good example of that. Taking into account the characteristics of each subject, questions were split into two different groups: whereas the most 'attractive', focussing on the (important) role developed by the respondents in the tourism field were placed right at the beginning of the questionnaire (Part I), other less 'pleasant' matters, such as age, gender and education, were left to the last part of the interview (Part V).

Secondly, two groups of open-ended questions providing a discussion about the strengths and weaknesses of the Portuguese tourism boards and about the hypothetical implementation of networks of organisations, were introduced into Part IV. These questions were intentionally placed at the end of the questionnaire for the following reasons. To start with, although the closed questions seem to provide a comprehensive perspective of all topics which are intended to be covered in this thesis, researchers should never underestimate the fact that complementary information may be gathered during a relaxed 'chat'. Furthermore, when placed after closed questions, open-ended questions may be used to double-check the validity of the information collected before. Finally, as a result of the size of the Interview-Questionnaire, open-ended questions had to be left for the last part of the interview, otherwise it would be difficult to finish the questionnaire since respondents tend to spend a long time on open-ended questions.

In addition to these main changes, other smaller improvements were also made to the questionnaire. To start with, several scales were redesigned and changed to a three or five point scale, according to the results which emerged from the pilot (see section 6.5). In particular, it was found that while a 5 point likert scale is particularly well adjusted for relational questions and for assessing the operation of the administration, the same does not happen when the respondents are asked to comment statements. Hence, whereas a 5 point scale was utilized for relational questions (Part II, Q1 to Q14) and for inquiries about the operation, strengths and weaknesses of both tourism boards and networks (Part IV, questions I4 and II4), a three point scale was used instead whenever the interviewees were asked to comment statements about the strengths and weaknesses of tourism networks (Q17 to Q28).

Also, the questionnaire layout was enhanced in order to make its handling and the use of checklists easier. Yet, the organisation and layout of the questionnaire were ameliorated in order to improve the sequence of the questions as well as their structure and attractiveness. Finally, several displays were designed and shown to the interviewees in order to make questions easier to answer.

Another outcome which emerged from the pilot was linked to the fact that many of the problems affecting the functioning of tourism at regional level are due to the lack of resources under which most tourism boards operate in Portugal (e.g., lack of economic resources and qualified staff). Taking that into account it was also decided to send a (brief) postal questionnaire to the 19 Portuguese tourism boards in order to assess whether such a claim was true.

The postal questionnaire (see questionnaire II in Appendix III) was structured into two main parts, in which part I includes a question about the budget of the Portuguese tourism boards; and part II comprises 4 tables which seek to collect information about the staff working in the tourism boards (e.g., age, gender, qualifications, etc). The questions were split into four groups: the Executive Commission (President and Vice-Presidents) (Table 1); advisory staff to the President (Table 2); staff working in tourist information offices (Table 3); and staff working in the tourism board headquarters (Table 4). In addition, the tourism boards were asked about their activity and budget plans, since it was believed that such information could help to provide a diagnosis of their activities and to evaluate their operation.

The postal questionnaire was tested on one Portuguese tourism board (Rota da Luz tourism board), and, after having introduced some minor changes, it was posted to the 19 Portuguese boards. In a first round 8 boards promptly answered the questionnaire, which represents a rate of response of 42%. In a second round, which implied direct contacts, both by telephone and fax, with the remaining 11 boards, 5 other boards decided to return the questionnaire, which has brought the rate of response to 68% (these results are summarized in table 6.3). Taking into account the high rate of response and the fact that the postal questionnaire was returned by tourism boards located all around the country, then it may be said that the information collected is highly representative of the whole population.

As far as secondary data is concerned the results produced by the pilot showed that, with more or less difficulty, it would be possible to access all the secondary information needed for this thesis, such as tourism trends; the economics of the Portuguese tourism; the characteristics of the Portuguese RTBs in terms of personnel, budget, resources spent on planning, promotion, etc (see chapter 7). Therefore no further changes were introduced into this area in relation to the pilot (see section 6.5).

6.7 Sampling

6.7.1 Sampling among regions (quota sampling)

Chapter 5 provided an expanded analysis of the characteristics of tourism in Portugal. As discussed, the Portuguese tourism is a seasonal phenomenon (see figures 5.7 and 5.17) since it depends on the periodical tourist flows of the 'sun-sea-sand' market (see figures 5.6 and 5.18). As a result of that most tourist flows are directed to coastal areas located within the promotional regions of the Green Coast, the Silver Coast, the Lisbon Coast and the Algarve (see map 5.5).

The close liaison between the Portuguese tourism and the coastline was also discussed in section 5.3.2.3. It was then shown that the four promotional regions located along the coastline account for 93% of the tourism bednights of mainland Portugal, as well as for 89% of the rooms and for 89% of the working population employed in the tourism sector. Conversely, the two other promotional regions, located away from the coastline, i.e. the Valleys and the Mountains regions (see map 5.5), account together for only 7% of the tourism bednights in mainland Portugal, as well as for 11% of the rooms and for 11% of the staff employed in the tourism sector.

Therefore, it may be concluded that the vast majority of the tourist flows in Portugal are directed to the littoral areas. In addition to that some boards located within the coastline comprise areas which are not exclusively linked to beach tourism but also to the forms of tourism which are offered in the Valleys and in the Mountains regions (e.g., rural and cultural tourism; areas of outstanding beauty and natural parks; mountains; fine scenery; archaeological sites; gastronomy; etc) (see map 5.6 and tables 5.1a and 5.1b).

Bearing this in mind it may then be concluded that a representative study of the Portuguese tourism may be carried out by considering coastline areas only, provided that it is not one of its aims to examine the peculiarity of tourism in the inland area. Taking into account these considerations it was then found that a sample extracted from the coastal areas located within the promotional regions of the Green Coast, the Silver Coast, the Lisbon Coast and the Algarve would provide a representative study of tourism in Portugal.

A second main decision which has to be taken whenever studying the Portuguese regional tourism organisation is how to extract a representative sample of the population when, generally speaking, there are several RTBs operating within the boundaries of the same promotional regions (see maps 5.5 and 5.6). Since the area covered by the Algarve board and the Algarve

promotional region overlap each other, this matter is not an issue in this region. However, if the discussion moves to other places a different situation is found.

For instance, there are two boards responsible for tourism within the Green Coast: the 'Alto Minho' and the 'Verde Minho' tourism boards (see maps 5.5 and 5.6). However, it is recognized in Portugal that the Alto Minho board is more dynamic, larger, as well as more representative of the Green Coast tourism. In addition to this, the Verde Minho board has, over recent years, operated with scarce resources, since it is only now recovering from several financial and political problems which almost led it to bankruptcy. Taking into account these facts it was then found that the Alto Minho tourism board would be more representative of the Green Coast tourism than the Verde Minho board.

The decision of what board should be selected in the Silver Coast is, however, more difficult to resolve, since there are four boards which operate within this promotional region: the 'Rota da Luz', the 'Centro', the 'Rota do Sol', and the 'Oeste' (see maps 5.5 and 5.6). However, not denying the importance and peculiarity of each one, evidence shows that there is a great deal of similarity among all of them in terms of products offered, stage of tourism development, size, and problems (e.g. lack of qualified staff, financial problems, etc). Bearing this in mind it was decided to choose the Rota da Luz board to represent the Silver coast tourism as a result of the following.

To begin with, since the region covered by the Rota da Luz board is among the areas most frequently targeted by the researchers of the University of Aveiro, which is located within the boundaries of the Rota da Luz board, it was thought that such information could potentially be useful to explain some of the issues raised in this thesis. It was also believed that it would be easier to access to information available in the Rota da Luz board, since there is a close relationship between this board and the Aveiro University (e.g., the University of Aveiro is one of the members of the Rota da Luz board; and there are permanent contacts, both formal and informal, between them). As a result of that, it was then found that it would be sensible to choose the Rota da Luz board to represent the tourism sector of the Silver Coast promotional region. It should nevertheless be pointed out that because the sample extracted from the Rota da Luz tourism board does not include the same members of the board used during the pilot (with the exception of the tourism board president), then any bias was introduced into the research process.

Finally, there are two boards operating within the Lisbon Coast promotional region (see map 5.5): the 'Costa Azul' board and the Costa do Estoril Tourism 'Junta'. However, and as described in section 5.3.1, the origin of tourism in the Lisbon Coast, as well as in Portugal, is

associated with the Estoril area, since it was in this region that the first resort was launched in Portugal; in addition to that it should be taken into account that this area was Portugal's most popular tourism region up to the Algarve boom of the mid-1960s (see figure 5.5). Bearing this in mind it was then decided that the Costa do Estoril Tourism 'Junta' would better represent the characteristics of the Lisbon Coast than the 'Costa Azul' board.

As illustrated by table 6.1 and map 6.1 (for an expanded analysis see also tables 5.1a, 5.1.b, figures 5.19, 5.20; maps 5.5 and 5.6) by selecting these four boards (the Alto Minho, the Rota da Luz, the Costa do Estoril and the Algarve) the collection of a sample which offers a diversity of situations of the Portuguese tourism, in terms of products, markets, travel characteristics, stages of development, board size, geographic location, etc, is also ensured.

Having explained the process by which these boards were selected (quota sampling), the following section will continue to expand on this theme by explaining the reasoning used to extract samples from these boards (stratified, systematic and random sampling).

6.7.2 Sampling within the tourism boards (stratified, systematic and random sampling)

Most of the research conducted into the network analysis field focuses on small networks of people or organisations, and, as a result of that, researchers tend to study populations instead of samples (see, for instance, Hall et al, 1981; Schmidt and Kochan, 1977). However, and similarly to other fields, the study of large populations is only possible, due to human and economic limitations, on the basis of samples extracted from populations.

Despite the fact that scientists use a number of common sampling techniques in descriptive and analytic statistics (e.g., probability methods), sampling in large networks is not so easy as it might be thought. Indeed, up to the 1970s *most discussions of network ideas (...) had practical application only to small groups (due to) the lack of a theoretical framework in which to place the network metaphor and in part from the absence - and perceived difficulty - of methods applicable to and statistical understanding of large networks (...)* It is clear why (up to the 1970s) *network methods (were) confined to small groups: existing methods (were) extremely sensitive, in their practicality, to group size because they (were) population rather than sampling methods* (Granovetter, 1976; p.1287-1288).

Map 6.1 - The sampling areas

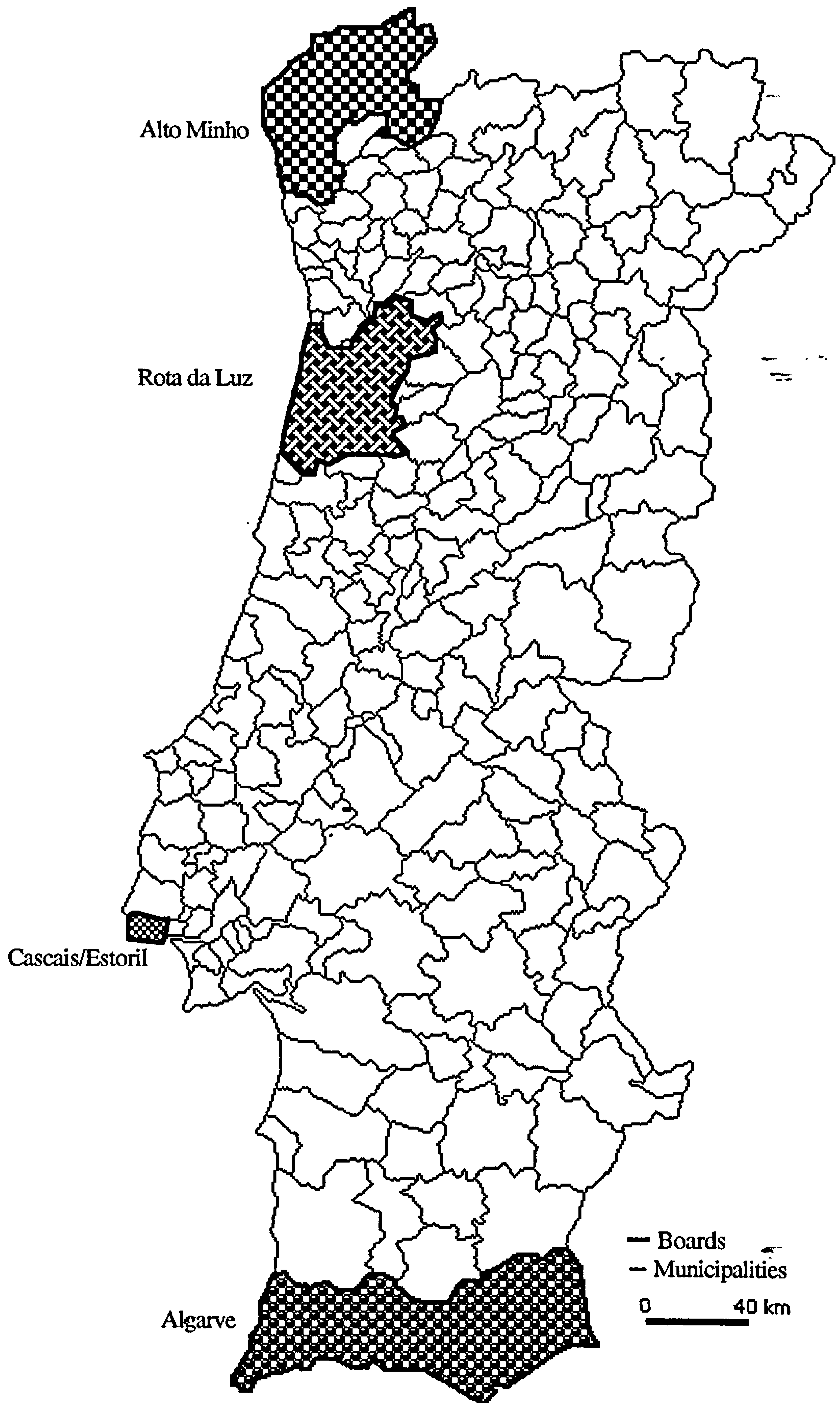


Table 6.1 - Characteristics of the boards included in the sample

<i>Promotional region</i>	<i>Green Coast</i>	<i>Silver Coast</i>	<i>Lisbon Coast</i>	<i>Algarve</i>
Tourist board selected	Alto Minho	Rota da Luz	Costa do Estoril	Algarve
Location	North	Central-North	Central-South	South
Stage of development	Involvement/ Development	Involvement/ Development	Regeneration	Maturity
Size of the board (annual budget)	Small (£0.6 million)	Small (£0.6 million)	Medium (£1.5 million)	Large (£6 million)
Markets	Mainly domestic tourism	Mainly domestic tourism	Mainly international tourism	Mainly international tourism
Tourism forms	Diversified (e.g. beach, mountains, rural, ecological, pilgrimage, gastronomy, spas, etc)	Diversified (e.g. beach, ecological, gastronomy, etc)	Diversified (e.g. beach, city tourism, golf, congresses, business, gambling, racing, etc)	Highly specialised on the 'sun-sea-sand' market
Travel characteristics	Mostly Independent Tour	Mostly Independent Tour	Mix of Independent Tour and Packages	Mostly Packages

The theory which allows sampling in large networks started to be developed in the mid-1970s, by academics such as Granovetter (1976, 1977), Frank (1969, 1978), Morgan and Rytine (1977), Erickson et al (1981), Pennings (1973), and Capobianco (1976) (for an expanded analysis see Wasserman and Faust, 1994, pp. 33-35, 732; and Knoke and Kuklinski, 1982, pp. 26-30). One of the most important developments which was introduced into this field is a model created by Granovetter in the mid-1970s, which has made sampling in large networks possible.

However, and as pointed out by Granovetter, the model also suffers from some limitations; the most important one, which is *a nice irony of the method, (...) is that it is of only marginal value for 'small' populations. For a population of size 50, for example, one would need a random sample of at least 25 for a decent estimate* (a table describing the sample sizes which are required to meet 20% error and 95% confidence limits was also developed by Granovetter) (see Granovetter, 1976; p.1295). Despite its limitations, the model developed by Granovetter also brought evidence to Pennings' claims raised only three years before, when he studied a sample of 60% of actors extracted from a population of 3,853 individuals and argued that his results were highly representative of the whole population (Pennings, 1973; p. 691).

The second most important development which was introduced into this field is due to Frank, who also proved that sampling from large networks leads to significant results, provided that bias are not introduced during the research process (see Frank, 1978). Bearing in mind the criticism which had been raised by researchers such as Morgan and Rytine (1977) and Erickson et al (1981), about some of the weaknesses undermining his theory, he successfully applied the statistical developments developed before by Granovetter to a large population of 750 bridge players in Ottawa-Hull. That is, he also found that random samples provide an *unbiased estimate (...) of the whole network*, and that *an error of 10%, or half of the 20%, that Granovetter suggest would be acceptable for most practical purposes* (Erickson et al, 1981; pp. 127, 135). It should, nevertheless, be pointed out that, despite all these developments, *considerable work remains in developing good techniques for network sampling and good measures of sampling variability for network concepts, especially for ego-centered and very large networks* (Wasserman and Faust, 1994; p. 732).

It was based on these developments that the sampling process for this research was designed. Based on Granovetter's and Frank's theory it was then found that a random sample of 50% of organisations would provide representative results of the whole population.

As illustrated by figure 5.27 the Portuguese boards include three main strata: municipalities (50% of seats); private sector organisations (25% of seats); public sector organisations (25% of

seats); and an extra seat held by the tourism board president. The sample was collected taking into account the size of each strata within the tourism boards (stratified sampling) (for an expanded analysis of the stratified sampling process see, for instance, Sarantakos, 1994, pp. 131-133; Caswell, 1982, pp. 8-10; Blalock, 1981, pp. 560-567; Hoinville and Jowell, 1977, pp. 62-63).

As far as the municipalities are concerned they were ranked according to their level of tourism development, on the basis of the tourism VAT collected within their areas. A systematic sample of 50% of municipalities was collected to include in the sample municipalities at different stages of tourism development (for an expanded analysis of the systematic sampling process see, for instance, Sarantakos, 1994, pp. 130-131; Caswell, 1982, p. 8; Blalock, 1981, pp. 558-560; Hoinville and Jowell, 1977, pp. 61-62). Finally, a random sample of 50% of organisations was extracted from the other two strata: 25% of public sector organisations, and 25% of private sector organisations (for an expanded analysis of the random sampling process see, for instance, Sarantakos, 1994, pp. 120-130; Caswell, 1982, pp. 7-8; Blalock, 1981, pp. 554-558; Hoinville and Jowell, 1977, pp. 60-61).

Furthermore, it was also decided to include in the sample the four presidents of the boards, as a result of the following. Firstly, tourism board presidents assume a strategic role in the regional tourism organisation, since they are responsible for coordinating and stimulating tourism within their regions. Secondly, tourism board presidents are particularly well placed in the regional tourism organisation to provide a clear picture about the operation of tourism within their regions. Taking also into account that the research attempts to provide an insight into the problems and relationships of the organisations responsible for tourism at the regional level, that means that any bias is introduced if the sample size increases. Conversely, and provided that any bias is introduced in the way in which actors are selected, the bigger the sample the more accurate the results are, since the sample size will tend to the population.

Tables 6.2 and 6.2a provide a summary of the number of interview-questionnaires conducted in Portugal by region and the position of the respondents within their organisations, while table 6.3 shows the evolution of the number of answers which were obtained from the postal questionnaire sent to the 19 Portuguese RTBs (see also section 6.6).

Table 6.2 - Size and structure of the sample collected for the interview-questionnaire

	Alto Minho	Rota da Luz	Algarve	Costa Estoril	TÓTAL
Population	25	29	33	5	92
Sample	13 (52%)	15 (52%)	16 (48%)	3 (60%)	47 (51%)

Table 6.2a - Structure of the sample collected for the interview-questionnaire by position of the respondents within their organisations

Position of the respondents within their organisations	TOTAL
President of tourism board	5 (10%)
President of municipality	8 (17%)
Vice-president of municipality	14 (30%)
President of regional planning commission	1 (2%)
Vice-president of regional Planning Commission	1 (2%)
President of decentralized agency of Regional Planning Commission	2 (4%)
President of Commerce Chamber	2 (4%)
President of Polytechnic	1 (2%)
President of Port Authority	3 (6%)
President of Regional Environmental Commission	1 (2%)
President of decentralized agency of Regional Environmental Commission	1 (2%)
President of Workers Union linked to tourism	2 (4%)
Member of the cabinet of the Ministry of Transport	1 (2%)
Manager/owner of restaurant	2 (4%)
Manager/owner of camping field	1 (2%)
Manager/owner of rent-a-car agency	2 (4%)

Table 6.3 - Number of respondents to the postal questionnaire sent to the 19 Portuguese RTBs

	1st round	2nd round	TOTAL
Population (19 RTBs)	8 (42%)	5 (26%)	13 (68%)

6.8 Statistical techniques

6.8.1 Introduction

The process by which information was collected in Portugal was discussed in the above sections. It is now the objective of the following sections to explain the way in which the data was analysed.

A successful research depends on the clear way in which the contextual background, both theoretical and practical (preliminary fieldwork), is produced; on the way in which the research problem is raised; and on the methodology utilized to analyse the research questions (see figure 6.1) (Pizam, 1994). Subsequently, scientists must think carefully about how to analyse information. Although there are nowadays a number of statistical methods for doing this, particular care must be taken in the way in which techniques are selected, since lack of awareness of the available methods, such as a poor statistical background, and/or a random selection of techniques, may lead the research to become a random process in which the results may emerge disassociated from reality; be useless or even biased.

As mentioned in the above sections, despite the fact that there are nowadays a number of handbooks explaining how to deal with some commonly used statistical techniques, associated with descriptive studies (e.g., Sarantakos, 1994; Caswell, 1982; Blalock, 1981; Hoinville and Jowell, 1977), the network or sociometric analysis is an emerging field in social sciences, and, as a result of that, most research has been conducted by 'outsiders' with no particular background in this area. Hence, many techniques used to analyse sociometric data are directly imported from other sciences, and, therefore, research undertaken into this field is characterised by a great level of creativity and diversity. Knoke summarizes particularly well this thought by stating that *structural analysis is not an unified theory, but an assemblage of loosely connected perspectives on interaction within social networks* (Knoke, 1990, p. 9). Therefore, it seems sensible to explain 'what', 'why' and 'how' some techniques are used, and fit, into this research, especially because some of them were designed especially for it.

6.8.2 Techniques for network representation and interpretation

6.8.2.1 Matrices and sociograms

It was shown previously, that one of the central objectives of this thesis is to examine the administrative framework in which tourism administration operates, since it is believed that the efficiency and effectiveness of the functioning of the tourism industry and of the planning process depends on the type of organisational framework which supports the operations of the tourism sector (see section 6.2). As a result of this, great emphasis has been put in this thesis on the design of methods capable of examining the type and characteristics of the connections established among the organisations associated with the tourism sector (see sections 6.5 and 6.6). This is the reason why it is also important to explain now the type of techniques which have been used to analyse that information.

The information obtained about the network of relationships established among groups of organisations is usually represented under a matrix format. A matrix is a tabular representation which includes an array of rows and columns, where rows usually stand for actors while columns represent variables.

Matrices are particularly useful for extensive data representations, and are often used alongside other complex mathematical graph representations (for an expanded analysis of the mathematical graph theory and in particular of the algebra emerging from this field see Whittaker, 1990; Tutte, 1984; Mayeda, 1972; Wilson, 1972; and Harris, 1970). However, whenever dealing with complex networks, involving many actors and variables, the matrix representation technique may become hard to understand, unpleasant, and may also provide poor results, the reason why it is used alongside other simpler techniques. Since this research will be dealing with several hundred variables and about fifty actors, matrix representations will be used together with several other techniques.

Graph representations are amongst the most frequent, and also simpler, techniques which are used by social scientists to represent and analyse data. Graph representations include, for instance, histograms, pies, bar charts, etc. However, the most often used graph representations utilized by scientists to represent sociometric data are sociograms, which consist of two dimensional displays invented by Moreno in the early 1930s (see Wasserman and Faust, 1994, p. 11). Sociograms are particularly powerful in visualizing the type of interlocking established among groups of actors in a network, the reason why several sociograms will be designed in this thesis with the objective of describing the type of network of relationships set up among the

organisations associated with the tourism sector (see figures 7.11, 7.12 and 7.13) (for an expanded analysis of the limitations of this technique see Knoke and Kuklinski, 1983, p. 38).

As a result of their potential some researchers have proposed more complex forms of sociograms. For instance Klovdahl, arguing that *visual representations have proven very useful in some of the most important discoveries in the history of science*, proposes a three-dimensional representation of sociograms which seems particularly useful in examining networks characterised by complex forms of interlocking (Klovdahl, 1981). Despite the advantages offered by his three-dimensional sociograms, such graph representations will not be used in this thesis, since they demand particular software which is not yet available in many places. Besides, two dimension sociograms offer enough potential to explore the interconnected relationships established among actors within a network, as will be seen in chapter-7.

Networks portray relationships among objects, organisations, events, etc; therefore, sociograms are network flow models which allow the visualization of the way in which such elements are linked to each other.

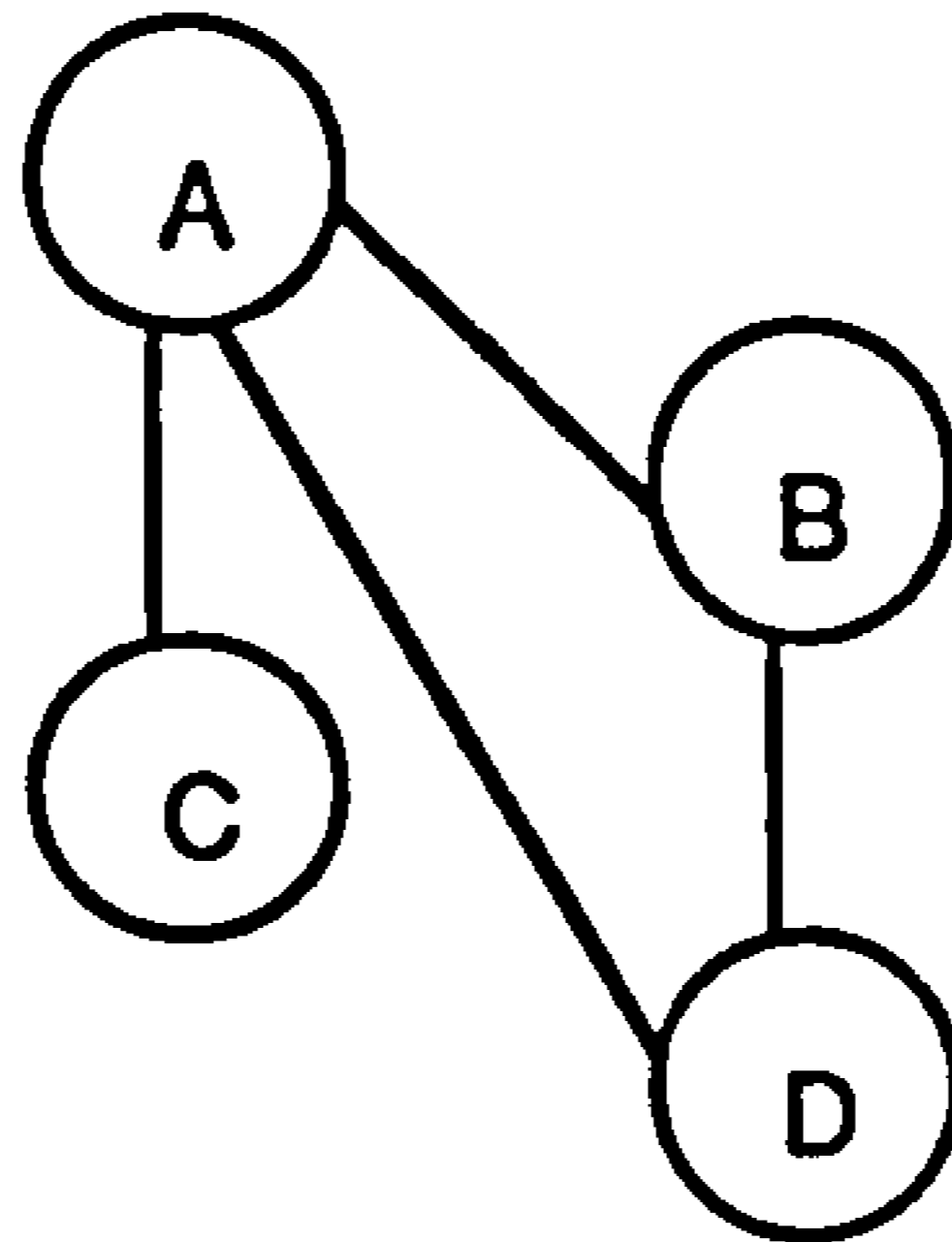
There are a number of concepts used in network representation; however, because it would not make sense to provide definitions of concepts which will not be used in this thesis, it may be recommend the following sources for an expanded analysis of this topic: Wasserman and Faust (1994), Barnett and Rice (1985), Zachary (1984), and Knoke and Kuklinski (1983).

'Nodes', 'actors' or 'positions' are terms used to label the elements represented in a network, which can be individuals, organisations, events, etc. 'Edges', 'arches', 'ties' or 'links' are names often given to the liaison(s) established among actors within a network (for an expanded analysis see Knoke, 1990 p. 8)

For instance, figure 6.2 illustrates an undirected network involving four actors: while the circles which are represented by letters A, B, C and D stand for actors (nodes), the lines (edges or arches) which link them stand for the relationships which are established between them.

Networks may however assume more complex forms. For instance, it is shown in figure 6.3 an example of a network which, in addition to the previous one, also represents the direction of the relationships set up among actors (directed network). That is, when studying the way in which information flows between actors it might be found that despite the fact that, for

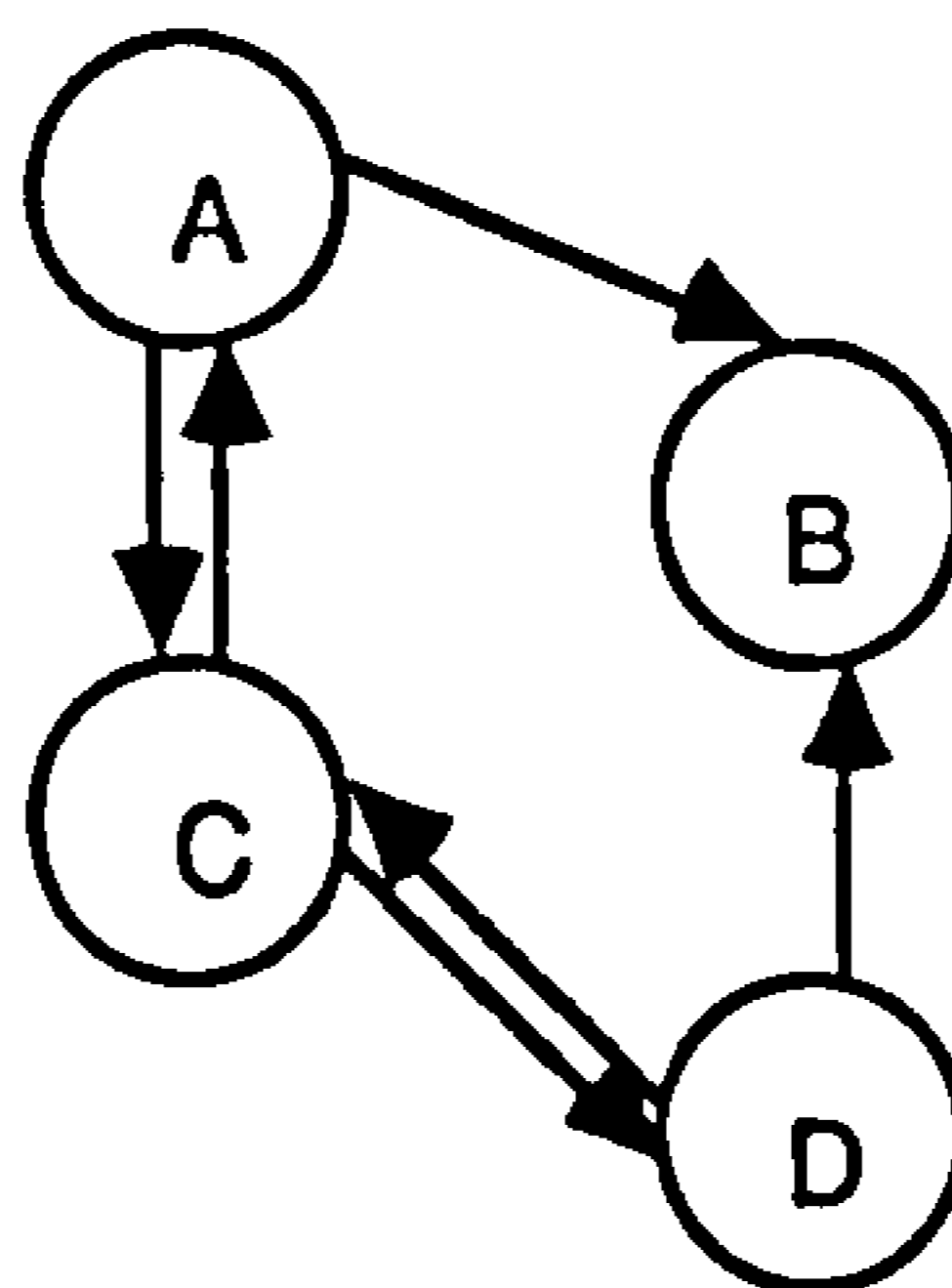
Figure 6.2 - Example of an undirected network



instance, actor A provides information to actor B, actor B does not supply information to actor A (see figure 6.3). Furthermore, it might also be found that the relationship established between two actors involves the exchange of information in both ways, a situation which should be represented with two arrows with opposite directions (see figure 6.3).

Despite the potential offered by graph representations of directed networks, they will not be used in this thesis since they imply the study of the whole population, and, as a result of that, they are often used in the study of small size populations (see also section 6.4). Indeed, research conducted in sociometric analysis has proved that samples extracted from large populations do not provide accurate estimates of the direction of the phenomena which link actors in a network (for an expanded analysis see Granovetter, 1976; Frank, 1978; Erickson et al, 1981; Knoke and Kuklinsky, 1982).

Figure 6.3 - Example of a directed network



6.8.2.2 Mathematical equations

Despite the potential offered by sociograms to interpret and analyse information, they are often short in providing a full and accurate evaluation of the interlocking established among actors within a network (see Knoke and Kuklinski, 1983, p. 38), the reason why they are used alongside other techniques, such as mathematical equations. Besides, evidence has also shown that analysis involving the simultaneous use of both qualitative and quantitative techniques ('triangulation technique') may provide deeper and richer insights into the problems.

It was based on this situation that several mathematical equations were specifically designed for this thesis, with the objective of obtaining a clearer picture of the way and intensity of the relationships set up among the organisations linked to the tourism sector.

For instance, and to begin with, 'Index of Connectivity' (IC) of an actor in a network will be understood in this thesis as the proportion between the number of arches linked to an actor and the total number of links which may be directed to that actor (equation 6.1) (see also Wasserman and Faust, 1994; Tutte, 1966). It should, nevertheless, be pointed out that because self-directed relationships will not be considered in this thesis, the maximum number of ties which potentially may be linked to an actor is 'N-1' instead of 'N'. This index will be particularly useful to identify those organisations which are more intensively linked to the tourism organisation, and, hence, show stronger levels of coordination of policies; have easier access to information; etc (see section 7.3.1)

Equation 6.1- Index of connectivity (IC)

$$IC = \frac{n_i}{N-1}$$

Where:

n_i - existing number of arches

N- size of population

Based on this equation, as well as on other calculations, the term 'prominent' will be used to label actors which are in the centre of multiple links in a network; prominence will also be used with the meaning of centrality and prestige. Based on these calculations organisations will be categorized into prominent or peripheral, visible or anonymous, according to their number of ties to other actors in the network (for an expanded analysis see Wasserman and Faust, 1994,

pp. 169-176; Knoke and Burt, 1983; p. 195). As will be seen further, prominence in the tourism sector is also linked to the notion of power and control of the tourism organisation (see section 7.3.3).

Furthermore, 'Maximum Connectivity of a Network' (MCN) will be understood as the maximum number of edges which a network may contain (equation 6.2). It should again be underlined that because directed networks are out of the scope of this thesis, calculations will be made on the basis of combinations. However, whenever dealing with directed networks researchers must use permutations instead, since they are sensitive to the direction in which ties are set up. This index assumes particular importance in this thesis, since it provides a quantitative measure for the intensity of the liaisons which are established among the members of tourism administration (see section 7.3.1).

Equation 6.2 - Maximum connectivity of a network (MCN)

$$MCN = C_2^N = \frac{N!}{2!(N-2)!}$$

Taking into account equations 6.1 and 6.2 'connectedness of a network (CN)' will be defined as a proportion between existing and maximum number of links of a network (equation 6.3) (for an expanded analysis see Barnett and Rice, 1985).

Equation 6.3 - Connectedness of a network (CN)

$$CN = \frac{\sum n_i}{C_2^N}$$

Furthermore, and instead of dealing with isolated actors within a network, it might also be useful to examine the way in which group of actors are tied to each other. For instance, by taking into account variables such as size, budget, nature, etc, organisations may be clustered into different sub-groups and the study of such sub-groups may afford useful explanations for the way in which, and the reason why, some actors privilege relationships with certain type of organisations. As far as tourism is concerned, the study of groups may help to examine things such as whether the intensity of communication varies according to the nature of the

organisation; whether organisations of different sizes have the same type of connections within the network; whether spatial location is a variable which influences the intensity of the relationships within the network; etc (see, for instance, sections 7.3.1, 7.3.4 and 7.3.11)

Accordingly, and following the definitions developed by Wasserman and Faust (1994) and Zachary (1984), 'cliques' of organisations will be understood as subgroups of organisations which, in comparison with the whole network, are more cohesive internally; *within a cohesive clique, the stronger and more frequent the empathic communications, the more likely are clique members to foster similar social and political attitudes in one another* (Knoke, 1990, p. 12).

Despite providing important theoretical considerations about the nature and characteristics of cliques, literature in sociometric analysis lacks techniques to identify and to measure the internal cohesion of such subgroups of actors. In order to overcome this shortcoming the following definition and equation were created for this research: 'Connectedness of a group' (CG) will be understood in this thesis as the relative strength of a group in relation to the other parts of the network; the mathematical translation of this definition is represented by equation 6.4.

Equation 6.4 - Connectedness of a group (CG)

$$CG = \frac{n_t}{C_2^r + r(N-r)} \Leftrightarrow \frac{n_t}{\frac{r!}{2!(r-2)!} + r(N-r)}$$

where:

n_t - number of arches occurring in the group

r - group size

N - population size

Finally, and following Cappobianco and Molluzzo (1979/80; p. 275), the 'strength of a point in a graph' can be defined as the increase in the number of connected components in the graph upon removal of the point. As will be seen later, the removal of actors from a network may indeed lead to its fragmentation and, thus, to the creation of subgroups, particularly in those situations in which actors have few links to the network and/or when their link to the network depends on other actors. The study of the strength of some points in a graph will also help to examine whether tourism administrations are formal structures, or whether they are founded on an informal network of relationships which goes beyond the administrative framework which is set up by governments (see section 7.3.2).

For instance, figure 6.4 provides an example of a completely interlocked network, in which all actors are, directly or indirectly, linked to each other. However, two different situations may happen when disconnecting some actors from the network. Figure 6.4a illustrates a situation in which after removing actor C from the network all the other nodes remain tied to each other. Under this circumstance it is said that the strength of actor C in the network is zero, since its removal does not imply the fragmentation of the network. However, it is shown by figure 6.4b that when removing actor B the network falls apart into two disconnected subgroups, which means that the strength of actor B in the network is 1 since the removal of B implies the creation of an 'another' network.

Figure 6.4 - Example of a completely interlocked network

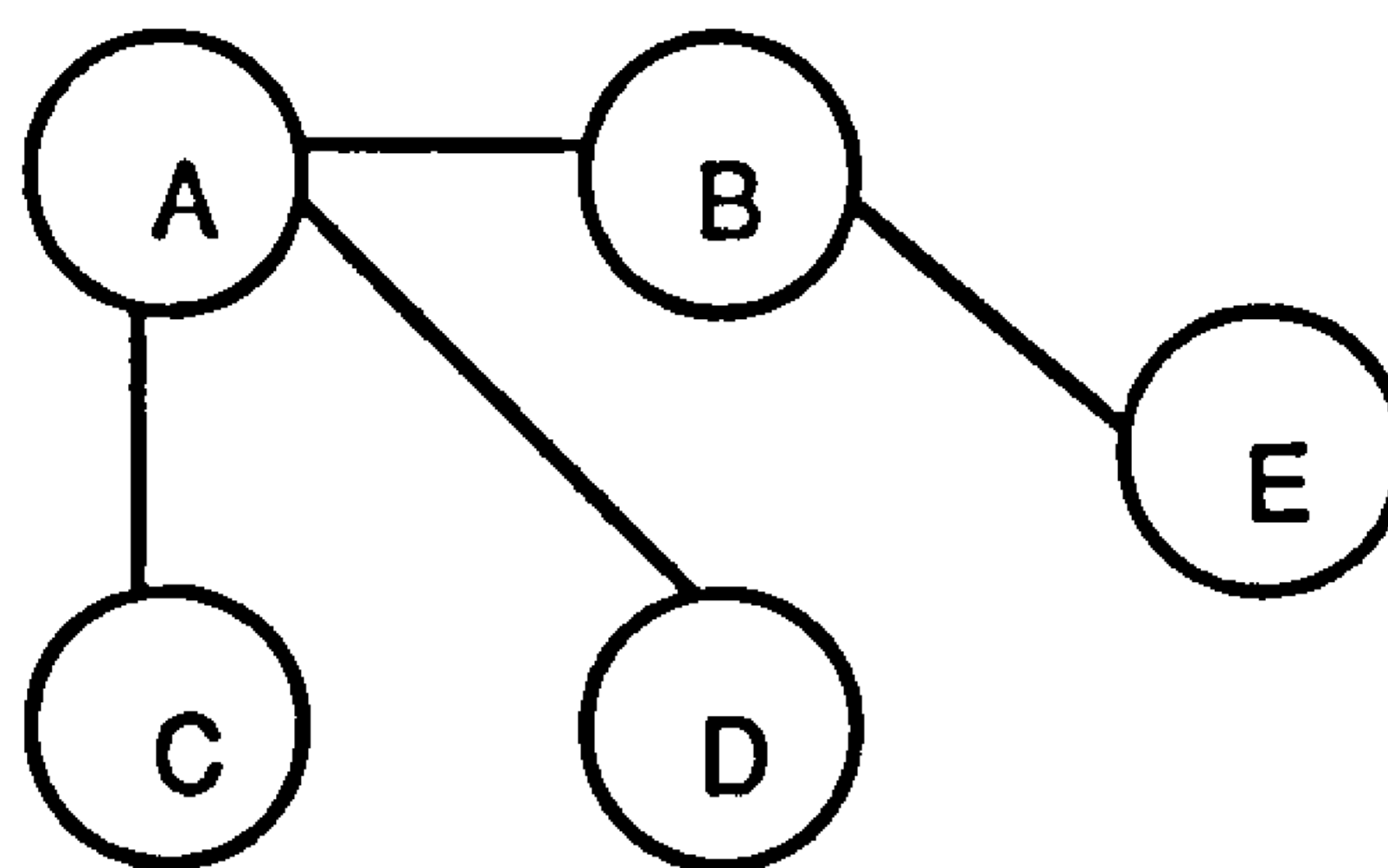


Figure 6.4a - Example of a network in which all nodes remain interlocked after removing one actor

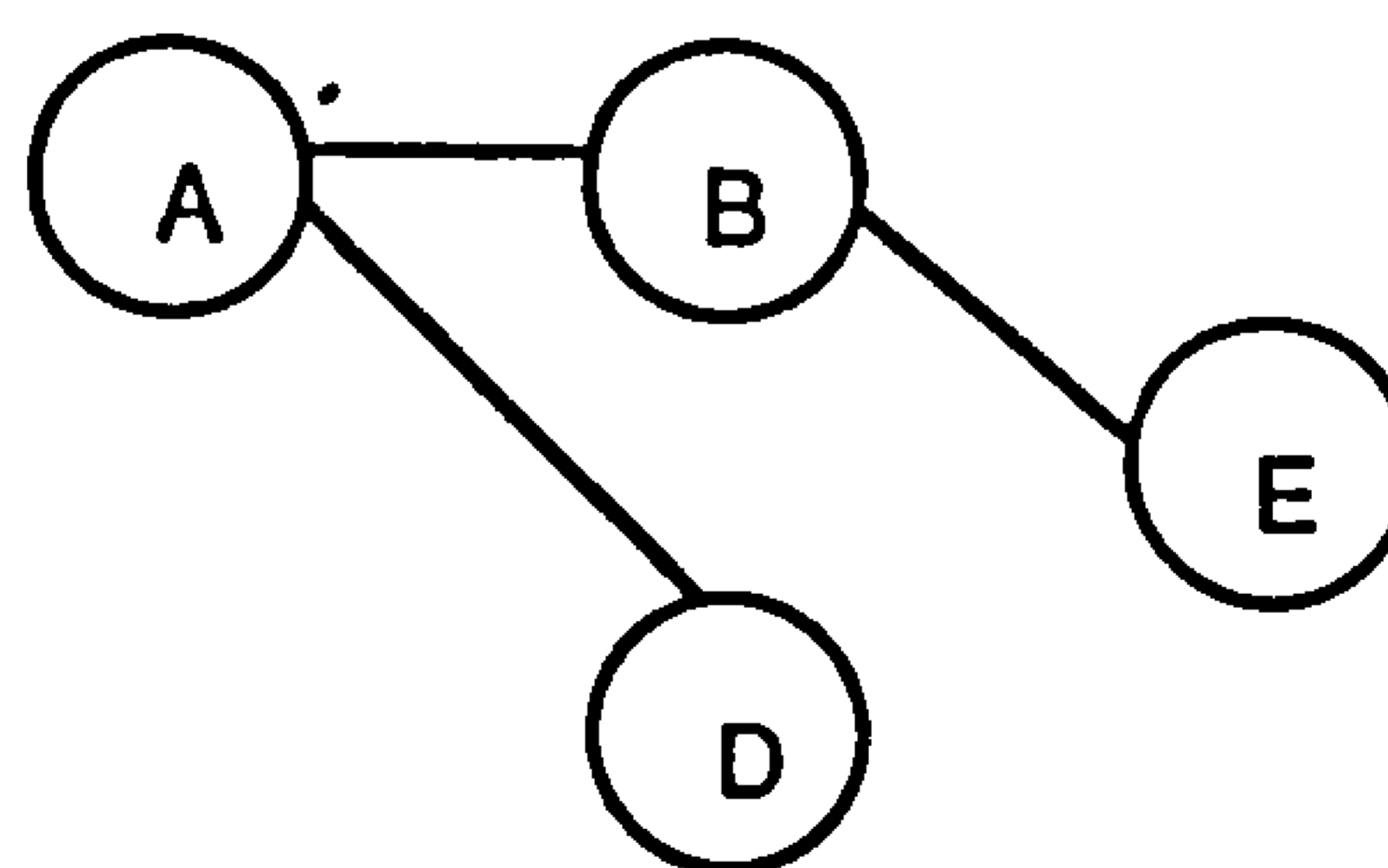
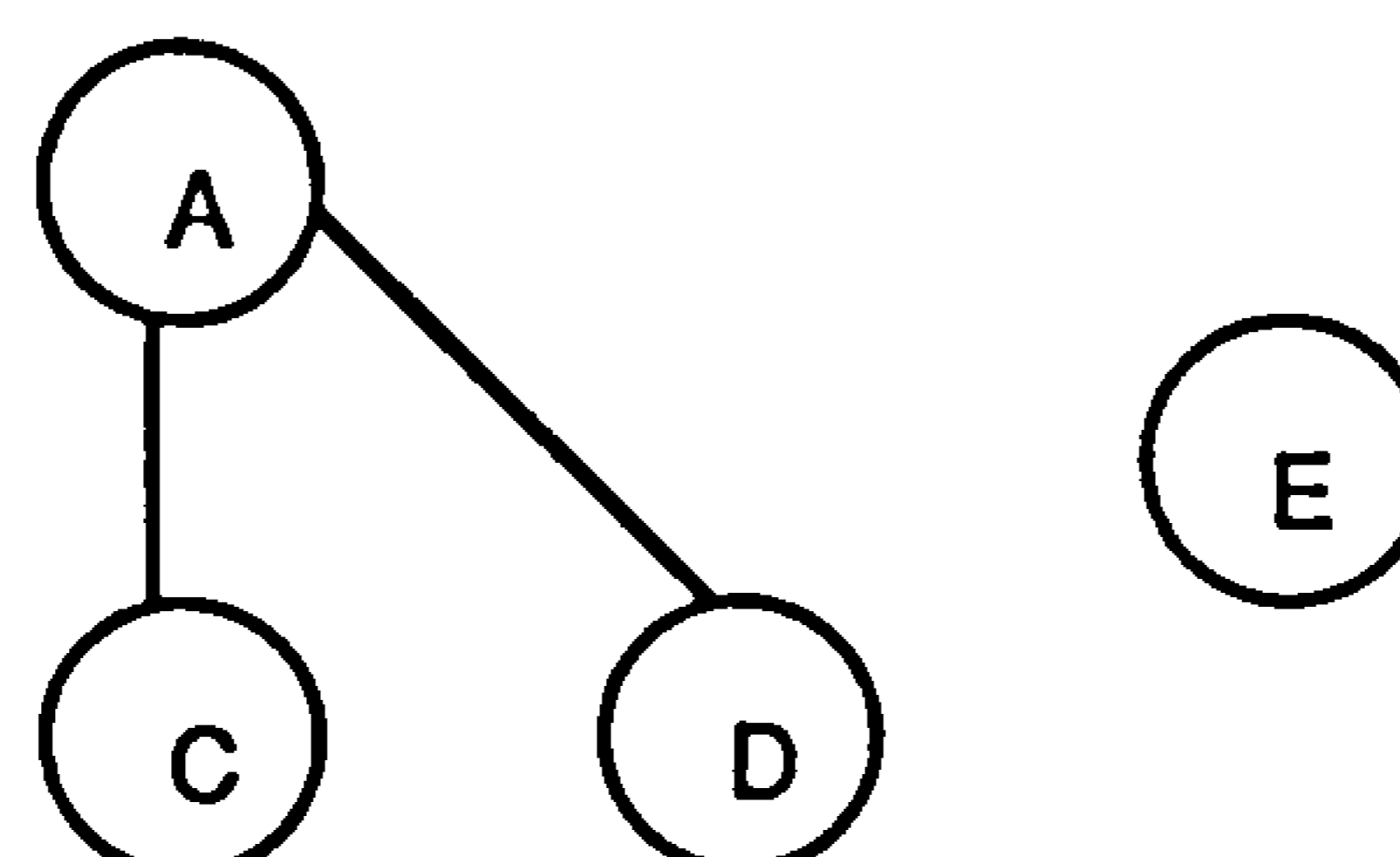


Figure 6.4b - Example of a (disconnected) network in which one node become disconnected after removing one actor



6.8.3 Content analysis

A dominant feature of all human civilizations is that of communication. Alphabets were created to allow rapid and efficient forms of communication; schools were established to allow the transference of knowledge to people; media were invented to transmit news and information more rapidly. That is, *communication is at the heart of civilization* (Kuhn, 1963; p. 151, in Holsti, 1964; p. 1)

In a world responsible for producing large amounts of information it is often necessary to use some statistical tools to examine messages contained in speeches, discussions, newspapers, etc. The content analysis is a technique *in which communication content is transformed, through objective and systematic application of categorization rules, into data that can be summarized and compared* (Paisley, in Holsti, 1964; p. 3); that is, the technique allows the *scientific analysis of communication messages* (Barcus, 1959; p. 8 in Holsti, 1964; p. 3). In addition to that, content analysis also allows the researcher *to check the validity of other types of data, especially information related to social attitudes and behaviour patterns* (Crandal, 1994, p. 420).

Two main requisites have to be fulfilled whenever using the content analysis technique (Weber, 1990; Holsti, 1964; Wohlmuth, 1994): firstly, the analysis must be reliable, that is, the results must be invariant over time as well as independent of the coder; secondly, when engaged in the data-reduction process, the categories, i.e. the explanatory variables of a problem, must be mutually exclusive.

Although often used to compare media or 'levels' of communication; to reflect cultural patterns of groups, institutions or societies; to describe trends in communication content, to disclose international differences in communication content; etc; the content analysis technique is also of great potential to analyse information collected by open-ended questions. In particular, the technique helps to identify messages transmitted by respondents, by clustering them into mutually exclusive groups of issues/variables, which may be evaluated further with the help of quantitative analysis. This was the procedure utilized to analyse the information collected by the open-ended questions included in the interview-questionnaires (see section 6.6), and whose results are discussed in sections 7.4.2, 7.4.3, 8.3.2 and 8.3.3.

6.8.4 Distance measures - similarity and dissimilarity

Distance measures were developed in statistics to help mathematicians, social scientists, biologists, archeologists and other academics and practitioners to measure the distance (similarity or dissimilarity) between objects, events, organisations, etc. Despite of being used individually in many areas, distance measures are also part of other statistical methods, such as factor analysis, principal components analysis, multidimensional scaling, cluster analysis, etc. In particular, and as will be seen later, distance measures may help researchers to examine the relative proximity between objects or events, and thus to group them into homogeneous clusters, the reason why they are often used in regional analysis (e.g., definition of homogeneous regions, tourism products, etc) (see section 6.8.5). As far as this research is concerned, the use of distances may help to identify the level of similarity among the members of tourism administration, and explain why the pattern of the relationships established among them is not uniform (see, for instance, sections 7.3.1, 7.3.4, and 7.3.11).

The use of similarity measures implies some knowledge of how to deal with correlation coefficients, since the way in which the technique looks at the similarity between pairs of objects depends on whether they are 'close' to each other, which may be found by the use of correlation coefficients. To put it more simply, similarity measures use correlation coefficients to look for similarities between objects and, thus, to group them into mutually independent clusters (smaller variance within the group and maximum variance among sets of variables) (for an expanded analysis see SPSS, 1993b, pp. 137-141).

Correlation coefficients may be categorized into two different groups according to whether they are used to analyse information provided in an interval or binary scale. When data is collected in a binary scale there are up to twenty options from which researchers may choose from (e.g., Russell and Rao, Jaccard, Dice, Rogers and Tanimoto, Kulczynski, etc). Conversely, when data is gathered in an interval scale there are two different correlation coefficients which may be used (Pearson's and Cosine's). It should nevertheless be said that options cannot be random since results are likely to vary according to the coefficient which is chosen by the researcher. In fact, coefficients differ from each other in the way in which they highlight or overlook relationships between pairs of variables, and therefore, whenever deciding which correlation coefficient should be used scientists must be aware of the phenomena which they wish to highlight as well as those which, as a result of their little importance, might be disregarded.

Since many questions in the interview-questionnaire were asked under an interval scale (see Appendix II) the decision of what coefficient should be used in this thesis falls between Pearson's and Cosine's coefficients. However, because Pearson's coefficient offers the

advantage of computing 'Z scores', which assume great importance when variables are measured in different scales or when their means are (significantly) different, it will be Pearson's coefficient which will be used to analyse the data collected in Portugal during the fieldwork.

Whenever the distance between objects in terms of their dissimilarity is measured, instead of similarity, the use of correlation coefficients is no longer needed, since the technique follows a different process: dissimilarities are searched for in terms of relative distance between objects, being that calculated by the use of different coefficients. Similarly to the correlation coefficients a decision has to be taken within a wide scope of options, which involve coefficients used in qualitative, ordinal, and quantitative scales. Since dissimilarity measures will be used in this thesis to analyse information collected under a quantitative scale, options fall into coefficients such as the Euclidean distance, average Euclidean distance, the coefficient of shape difference, Cosine's, the correlation coefficient, the Canberra Metric Coefficient and Bray-Curtis'; coefficients will then be selected according to the objectives which are sought in each particular situation (for an expanded analysis see Romesburg, 1984, pp. 93-104; and SPSS, 1993b, pp. 132-136).

6.8.5 Cluster analysis

Cluster analysis is a generic name for a variety of mathematical methods, numbering in hundreds, that can be used to find out which objects in a set are similar (Romesburg, 1984; p. 2). The technique groups objects into different clusters with the objective of creating groups within which variance is minimum, but also ensuring that there is a great variance between different clusters.

The cluster analysis technique is used in almost all fields. For instance archaeologists use cluster analysis to piece together evidence supporting their hypotheses concerning some historic periods; engineers use cluster analysis to find the best layout for a factory's machine (Romesburg, 1984; p. 8); biologists use cluster analysis to group animals and plants; planners use this technique to define homogeneous regions; tourist marketers use cluster analysis to define tourist typologies.

Despite its complexity cluster analysis has become easier to manipulate due to several software packages brought into the field, which has simplified hard matrix calculations (e.g., SPSS, SYSTAT, BMDP, SAS, CLUSTAR and CLUSTID). Besides, there is nowadays a large

amount of literature explaining the philosophy and best procedures to utilize this technique (e.g., Romesburg, 1984; Lorr, 1983; and Anderberg, 1973).

Despite its potential cluster analysis has been very much underutilized in tourism. For instance, in books and edited volumes focussing on techniques for analysing tourism information, such as those published by Smith (1995, 109-110, 11; 1989, pp. 52-62), Ritchie and Goeldner (1994, p. 256; 1987, p. 240), and Witt and Moutinho (1994, pp. 295, 302, 307, 564, 567; 1989; pp. 522, 565-566) little attention is paid to the cluster analysis technique; only Ryan (1995) spends a good share of his handbook using and describing the potential of the cluster analysis technique. Even in several widely quoted journals published in the tourism and hospitality management field few references are found to this technique; among the few exceptions can be cited West and Anthony (1990), Lewis (1985), Schroeder (1992) and McIntyre (1992).

Such a situation is particularly bizarre when cluster analysis offers great potential for tourism, such as to delimit tourist regions; to set up homogeneous tourism products; to circumscribe regional tourism boards; to segment markets; to study tourism generating regions; etc. In sociometric studies cluster analysis also offers great potential to identify those organisations which, due to their proximity in terms of, for instance, size, nature, operating philosophy, spatial location, etc, are close to each other, and, therefore, tend to pull together and set up cliques of organisations within the administration. The study of clusters may help to explain not only potential ruptures which may occur within the administration, but also affinities among organisations which may be used to improve the efficiency and effectiveness of the way in which tourism administration operates (see, for instance, sections 7.3.4 and 7.3.11).

Similarly to other hierarchical methods, the use of cluster analysis implies the following main steps (Romesburg, 1984; pp. 9-28): firstly, the researcher has to collect data and place it under a matrix format, in which columns should stand for the objects to be cluster analysed and rows for the attributes that describe the objects. Secondly, and optionally, the matrix may be standardized; this step converts the original attributes into new unitless variables. Thirdly, and by using either the data matrix or the standardized data matrix, a resemblance matrix is computed; a resemblance coefficient is then used to measure the overall resemblance, i.e. the relative distance between pairs of objects. Lastly, a cluster method is computed, and a map of sorts (e.g., a tree or dendogram) may finally be obtained.

6.8.6 Correlation measures

One of the problems with which researchers who deal with sociometric studies are often faced is the need to evaluate whether the type and nature of the relationships which are established among the members of a network depend on 'external' variables, such as size of the organisation, nature, spatial location, etc. For instance, there might be situations in which the importance of some areas for the tourism organisation depend on their level of tourism development (see section 7.3.14), or also that different levels of tourism development prompt different intensity of involvement in the tourism industry. Due to these and other examples, the use of correlation measures should always be considered carefully by researchers who deal with relational studies, and this is also the reason why correlation measures are used in this thesis (see, for instance, sections 7.3.1 and 7.3.14).

Generally speaking, it may be said that correlation measures, which are often represented by letters 'r' or ' ρ ', may be used to measure the linear association between variables. They show whether there is a positive or negative association between two variables ($r=+1$ and $r=-1$, respectively), or whether there is no linear association whatsoever between them ($r=0$).

6.8.7 Tests

6.8.7.1 Introduction

Tests are among the statistical tools most commonly used by scientists who have to deal with samples extracted from large populations, since they allow researchers to examine, within certain intervals of confidence, whether variables have normal distributions; whether samples belong to the same or different populations; etc, which are situations which will be found in many places of the data analysis (see chapters 7 and 8). As with many other statistical tools, there is a variety of tests from which researchers may choose. However, tests are designed for particular purposes and, therefore, their use cannot be random.

With the development of computers the use of tests has increasingly become easier, since many time consuming calculations have been simplified. As a result of that, *some students of (...) social sciences have tended to worship the statistician as someone who, with the aid of a magical computer, can make almost any study 'scientific'* (Blalock, 1981; p. 3). However, statistical methods are to be carefully used and demand a good explanation of all steps. This is the reason why the type of tests which are used in this thesis are explained here, in order to

clarify 'why', 'when', 'how' and 'what' sort of tests may help to prove or to defeat some of the claims which are raised.

6.8.7.2 Non-parametric or free distribution tests

Most of the tests used by researchers to analyse data belong to the family of the parametric tests. However, there are also situations in which non-parametric tests should be used instead. Non-parametric or free distribution tests are terms *used to refer to a large category of tests which do not require the normality assumption or any assumption that specifies the exact form of the population. Some assumptions about the nature of the population are required in all non-parametric tests, but these assumptions are generally weaker and less restrictive than those required in parametric tests* (Blalock, 1981; p. 247).

Non-parametric tests may be used only under one of the following conditions (Blalock, 1981; p. 248): either when dealing with interval scales or when the sample is small which invalidates the assumption that variables are normally distributed; that is, normal distributions may only be assumed when dealing with large samples. However, because most of the samples studied in this thesis are small (see table 6.2), it will not be possible to assume *a priori* that variables are normally distributed.

Since non-parametric tests are less powerful than their parametric counterparts, their simultaneous use is suggested in literature (see Blalock, 1981). That is, whenever the normality is accepted by the use of a non-parametric test, a parametric test should also be computed to double-check the results (e.g., Chi-Square or T Student tests).

There are several non-parametric tests from which researchers may choose. However every test has particular characteristics and therefore their use cannot be random. Some of the non-parametric tests most used by social scientists are as follows (see Blalock, 1981; pp. 247-276; SPSS, 1993a; pp. 377-408; Snedecor and Cochran, 1967; pp. 120-134).

The Mann-Whitney or Wilcoxon Test allows the researcher to assess whether two samples come from populations with the same distribution. The form of the distribution need not to be specified and the test does not require the variable to be measured in an interval scale; instead an ordinal scale is sufficient.

When dealing with more than two samples, an extension of the Mann-Whitney test may be obtained by the use of the Kruskal-Wallis One Way Analysis of Variance. Instead of comparing

two samples this test allows the researcher to analyse whether K-independent samples have similar distributions. Again this test is particularly important when dealing with unknown distributions. Although the test does not specify the type of distribution with which the researcher is dealing, it nevertheless allows him to assess whether K-independent distributions have similar distributions. For instance, this test will be of great importance to assess whether the samples collected in different parts of Portugal have similar distribution (see section 7.3.1).

Another test which will be used in this thesis is the Kolmogorov-Smirnov Test. This test is used to analyse how well a random sample of data fits a particular distribution (normal, uniform or Poisson) (see SPSS, 1993; p. 384). Similar to the Kruskal-Wallis One Way Analysis of Variance this is a test which will be used very often in this research, since it allows the researcher to evaluate whether normality may be accepted for the distribution of the variables collected in Portugal (see, for instance, sections 7.3.1, 7.3.5, and 7.3.8)

Many other examples of important non-parametric tests could be brought into this discussion; however, many of them do not fit in this thesis. For instance, some tests only allow comparisons between two samples (e.g. two-sample median test; Friedman test; two sample Wald-Wolfowitz runs test; and two sample Kolmogorov-Smirnov test); however, these tests are useless to this thesis since data was collected in four different locations (see map 6.1 and sections 5.7.1 and 5.7.2). Furthermore, other tests imply that distributions have a binomial distribution (e.g. binomial test), which is not the situation of the data which will be analysed here. Also, the Sign Test has similar characteristics to the Wilcoxon test but is less powerful since it does not take into account the differences between pairs of variables but, instead, only the direction of the differences. Yet, the Wald-Wolfowitz test examines whether a sequence of observations may be detected. In other words, it looks at the way in which the value of one observation influences the value for later observations. Although the analysis of 'runs' is important in areas such as psychology, the test is inadequate for this research.

6.8.7.3 Testing hypotheses about differences in means

To test hypotheses about differences in means is another issue with which many social scientists have to deal. For instance, whenever dealing with different samples, which is one of the situations observed in this thesis (see map 6.1), researchers often have to assess whether means obtained from different samples are significantly similar, or dissimilar, from each other, which may be answered by the use of tests based on the 'central-limit theorem' (e.g., T Test, Chi-Square, F Test). However, and in order to do so, there are two pre-requisites which must always be fulfilled (Blalock, 1981; p. 224): firstly, all samples must be independent from each

other; and secondly, samples must be collected randomly (for an expanded analysis see Blalock, 1981; SPSS, 1993a). Nevertheless, these are two requisites which were followed strictly in this thesis, as is discussed in section 6.7.

For instance, while analysing the information collected by several open-ended questions included in the questionnaire (see section 6.6) it will be important to evaluate whether the answers ('means') which are obtained from different samples may be considered similar to each other. Therefore, several tests based on the central limit theorem will be used (see sections 7.4.2, 7.4.3, 8.3.2 and 8.3.3).

6.9 Evaluation of the methodology

After having analysed some of the most important methodological options which had to be taken in this research, reported in the above sections, it is important to discuss now the strengths and weaknesses of the methodology adopted as well as to discuss alternatives on which this thesis could be based.

To start with, and as far as the sociometric analysis is concerned, most of the comments which could be introduced here were already discussed in section 6.4. It was then viewed that sociometric analysis provides a powerful and alternative way in which some phenomena may be examined. That is, instead of looking at problems in an atomistic way, network analysis allows insights into the complexity of the relationships established among group of individuals, organisations and events, which is particularly important in this phase of 'disorganised capitalism' in which both horizontal and vertical integration have become some of the cornerstones of success in areas such as business, planning, tourism, etc (see chapter 3).

Despite this potential researchers who deal with relational studies are likely to face a number of problems which may make their analysis difficult as well as time consuming. In particular, scientists must be aware that, due to its low level of maturation, sociometric analysis lacks consensual methods and techniques since this is an emerging field which is dominated by 'outsiders' with any particular background in these matters.

As a result of that, and unlike other already 'cemented' areas in social science, it is likely that researchers may have to design some methods and techniques, which may make their analysis longer. That is, whereas most of the concern put in other social science fields is oriented towards the way in which the research problem is raised; the methods by which information is collected; and the way in which results are analysed; scientists who deal with sociometric issues

may also have to spend a good share of time designing particular methods as well as searching for techniques in other sciences.

Another weakness which is observed in network analysis, and which influenced the way in which this research evolved, is linked to the lack of systematized information about how to analyse information. That is, despite important contributions to the field provided by authors such as Wasserman and Faust (1994), Burt and Minor (1983) and Knoke and Kuklinski (1982), it is nevertheless observed that there is no such thing as either a standard way or clear guidelines about how to analyse information. Conversely, research conducted into this field is characterized by a variety of approaches which may make the job of choosing the right techniques harder.

For instance, based on an extensive literature review it was initially thought that all information collected in Portugal could be analysed by SPSS. However, what was seen later was that SPSS is not the best statistical package to analyse sociometric information, since data had to be redesigned and reintroduced several times into the computer under different formats, causing unnecessary delays. It was then concluded that whenever dealing with sociometric information data should be analysed by the use of statistical packages specifically designed for this field, such as GRADAP, KrackPlot, NEGOPY and FATCAT, SNAPS, STRUCTURE and UCINET (for an expanded analysis see Wasserman and Faust, 1994, pp. 735-737), even if simultaneously other information has to be analysed by other more familiar statistical packages such as SPSS, SYSTAT, and SAS.

In addition to the diversity of methods from which researchers may choose, other decisions must also be made when dealing with sociometric information. For instance, it was assumed in this thesis that the boundaries of the Portuguese regional tourism organisation were those established by the Portuguese government (see sections 6.7.2, 5.3.2.5.3 and figure 5.27). However, such assumption might be seen in contradiction with previous discussions, as a result of the following.

First and foremost, it might appear a contradiction to accept here definitions provided by governments having discussed before that in a number of situations such definitions, and assumptions, are becoming outdated as well as inadequate to today's reality (see chapter 3). Furthermore, the tourism industry is characterized by the formal and informal interaction of a number of organisations which makes the task of tracing its boundaries a difficult or even impossible task (see section 1.4). Also, there is no such thing as a single concept of tourism organisation since the way in which organisations engage in the tourism industry varies from region to region according to things such as administrative and political organisation, stage of

tourism development, type of tourism products, etc; (see chapters 1 and 2). Finally, nowadays the planning trend is towards the establishment of organisations according to the peculiarity of each situation rather than on the basis of rigid definitions provided by governments (see chapters 2 to 4).

Based on this, as well as on other, considerations some researchers prefer to delimit their populations themselves, instead of working with official definitions. This is an alternative approach which could have been followed in this research but, due to economic and time restrictions, could not be considered. Among the techniques which may be used to circumscribe populations several non-probability methods such as snow-ball sampling may be cited (for an expanded analysis of non-probability methods see Sarantakos, 1994; Blalock, 1981).

With regard to the methods which were used to collect information in Portugal some comments must also be made. Despite the fact that interviews and questionnaires are amongst the most often used techniques to collect sociometric information, data may also be gathered by direct observation, as well as by the use of other techniques such as experiments, ego-centered techniques, 'small world', and diaries (see figure 6.1 - for an expanded analysis see Wasserman and Faust, 1994, p. 45). In comparison with interviews and questionnaires these methods offer the advantage of providing less subjective and, therefore, more accurate results. However, they also show several limitations, such as in situations in which organisations are recent and, therefore, lack historical information (because most tourist organisations are recent these methods may offer little interest for this field); when their working styles and operating philosophies are too different (it should not be forgotten that most tourist organisations involve a constellation of different organisations, such as public, private, and non-profit organisations, which might make their comparison based on working styles and operating philosophies almost impossible); etc.

Another matter which must also be taken into account in sociometric analysis is whether research should be based on samples or on populations. In comparison with samples, the study of populations allows the design of directed sociograms which are of great importance to examine the direction of the information exchanged among organisations (see section 6.8.2.1). In addition to that, directed sociograms allow indirect insights into sensitive issues such as power, influence, compatibility, etc. Nonetheless, it is likely that researchers will have to decide between the full study of a few populations or the study of samples extracted from a larger number of populations. Whereas the results obtained from the first option offer more detail but are less representative of the whole population (i.e. the method is adjusted to case studies), the second option leads to less elaborate but more representative results. It is then the

second option which is followed in this thesis, since one of the objectives is to obtain a representative study of Portuguese tourism.

Viewed from a planning perspective, and whenever dealing with sociometric analysis, planners are likely to face an additional dilemma. Chapter 7 will demonstrate particularly well that the largest bulk of the planning actions at regional and local level are undertaken by local authorities. This means that, from a planning point of view, the study of the network of the relationships set up among the organisations linked to the tourism sector may be circumscribed to the study of the network of relationships set up between local and regional planning organisations (i.e. municipalities and planning and environmental agencies).

However, that strongly conflicts with the arguments debated in this thesis. For instance, it was seen in section 2.4.2 that one of the limitations of the 'Alberta Destination Zone Process' (see figure 2.11) is linked to the fact that the model suggests that 'plan preparation' and 'implementation' are different sorts of enterprise. In sharp contrast with this, what is argued in this thesis is that tourism has much to benefit if public and private sector organisations are brought together into the core of the decision-making and -taking processes, because they are sides of the same coin. This also serves to explain why this thesis calls for closer proximity between public, private and non-profit organisations (chapters 2 and 3), and why particular emphasis is placed on a new organisational framework which seems capable of linking them horizontally (chapter 4).

Finally, scientists must be aware that despite its potential sociometric analysis tends to involve expensive and time-consuming research processes. Indeed, the fieldwork conducted in Portugal shows that the analysis of four regions (47 interviews) takes about 3.5 months; the average interview is likely to take 2.5 hours (total of 117.5 hours); despite Portugal's small size the fieldwork involved a total of 7,500 km travelled by car (see map 6.1), with a total cost which amounted to about PTE 750,000 (£3,000) (this includes 7,500 km travelled by car; telephone and fax contacts and subsistence costs excluding accommodation).

6.10 Conclusion

As discussed in this chapter, the aim of this thesis is to analyse the strengths, weaknesses, efficiency and effectiveness of Portuguese regional tourism organisation, as well as to examine whether forms of organisation based on the network philosophy are better adjusted to the tourism sector than traditional forms of administration such as hierarchies and markets. That is, this research deals simultaneously with some common statistical techniques usually labelled as

statistics descriptive, as well as with forms of relational analysis which allow the study of the characteristics of the relationships established among organisations.

As described in this chapter, statistics descriptive offer minor problems to researchers since they involve matters which are familiar to many social scientists. Conversely, whenever dealing with sociometric analysis scientists may face several problems arising from the low level of theoretical maturation in which relational analysis literature is supported as well as from the lack of standardized techniques to analyse information. Hence, research conducted into this field is likely to become more time consuming than other research projects undertaken in other fields.

Despite its methodological shortcomings sociometric analysis is a growing field within social sciences which offers a great potential for scientists interested in the study of the reasons which are the basis of the creation of webs of organisations, strategic alliances, horizontal and vertical integration of economic activities, etc. The potential of sociometric analysis for the tourism sector is also enormous, since research conducted in this field may help to clarify important 'grey areas' which are still a problem in the tourism sector, such as what the tourism industry is all about; how the amalgamation of tourism participants interlock with each other; what is the core and the periphery of the tourism sector made of; does the main problem of defining tourism rely on the fact that tourism is not an homogeneous but, instead, an heterogeneous sector?; how different types of organisations such as private and public sector organisations, may be brought together into the same coordinating agencies when they operate under different working styles and pursue different objectives?; etc.

This chapter has also attempted to demonstrate that being sociometric analysis, applied to the business area, an emerging field in social sciences, most research conducted into this field is characterized by a great creativity and variety of methods, since, in a number of situations, scientists have to look for techniques in other fields in order to solve their research problems. Such a situation is particularly important for the tourism knowledge when literature has shown that in many cases scientists who study the tourism phenomenon use little variety of research methods and techniques (see, for instance, Smith, 1995; and Ritchie and Goeldner, 1994).

Chapter 7

Data analysis I - The Portuguese RTBs

7.1 Introduction

In the literature review chapters (chapters 1 to 4) it was shown that the concepts of tourism, planning and organisation are changing rapidly. That is, from the inflexible, hierarchic, and packaged approaches based on the welfare state philosophy of the 1950s and 1960s, these concepts are moving towards a philosophy which comprises notions such as deregulation, flexibility, a comprehensive view of the systems, globalization, full valorization of economic, social and natural resources, inter-organisational cooperation, and horizontal thinking.

It is based on this position that what is proposed to be studied in this thesis are the ways in which the efficiency and effectiveness of tourism planning may be improved in the future. It is argued that the improvement of planning activity implies progress in the way in which the planning process is undertaken ('procedural component'), as well as improvement in the organisational framework in which planning activity is to be carried out ('administrative component') (see sections 6.2, 6.3 and figure 6.1).

To put it in a different way, the three central issues which are to be studied in this thesis are: (i) to examine the type, efficiency and effectiveness of the planning approaches undertaken by regional tourism administrations; (ii) to evaluate the type, efficiency and effectiveness of the organisational structures which support the functioning of tourism at the regional level; and (iii) to discuss ways in which the operation of tourism administration may be improved in the future. While the subject of the discussion in this chapter is centred on the two first issues, the

debate which is brought about in the following chapter (chapter 8) is directed towards the third one.

What is proposed in this chapter is (i) to examine the efficiency and effectiveness of the planning forms practiced by the Portuguese regional tourism administration; (ii) and to evaluate the efficiency and effectiveness of the organisational structure which supports the operation of Portuguese tourism administration. With reference to this, section 7.2 provides an insight into the characteristics of the Portuguese regional tourism organisation, both in terms of tourism boards and regional commissions. Furthermore, the discussion moves to a sociometric analysis, where the way in which tourism participants interlock with each other when they have to deal with tourism problems is debated (section 7.3). Finally, section 7.4 provides an expanded discussion about the strengths, which support, and weaknesses, which undermine, the operation of regional tourism administration.

Finally, it must be said that whenever describing the Portuguese RTBs (section 7.2) and examining the way in which regional tourism, and non-tourism, organisations communicate with each other (section 7.3), the discussion will be centred only in three out of the four sampling areas studied in Portugal, i.e. the Alto Minho, the Rota da Luz and the Algarve regions. That is, because the Costa do Estoril board is not a regional board but instead a (local) Tourism *Junta*, it may not be compared directly with the other three regions, neither would it be scientifically correct to do so, since its legislative framework, operating philosophy, objectives, size, and spatial jurisdiction, are different to those which were established for the RTBs (see sections 5.3.2.4 and 5.3.2.5). Nevertheless, the results which were collected in the tourism *Junta* of the Costa do Estoril will be analysed together with the data gathered in the other three boards while discussing matters linked to the efficiency and effectiveness of the Portuguese regional tourism organisation (section 7.4), as well as when assessing the potential offered by organisational structures based on the network philosophy for the functioning of the regional tourism administration (chapter 8).

7.2 The characteristics of the Portuguese regional tourism boards and regional tourism commissions

It was shown in chapter 6 (see in particular figure 6.1) that the techniques which were selected to collect information in Portugal comprise: (i) 'interview-questionnaires' (carried out on 47 members of the Portuguese regional tourism organisation); (ii) 'postal questionnaires' (answered by 68% of the Portuguese RTBs); and (iii) secondary data, which includes: (a) activity and budget plans that provide detailed information about the operations of the

Portuguese RTBs (these plans were returned by the Portuguese RTBs which answered the postal questionnaires, representing a sample of 68% of the population); (b) data published by international organisations (e.g., WTO and OECD) covering the full population (i.e. 19 RTBs); and (c) and data published by the Portuguese government (e.g., National Institute for Tourism Statistics; General Directorate for Tourism; and Ministry of Planning) which also covers the full population of Portuguese RTBs.

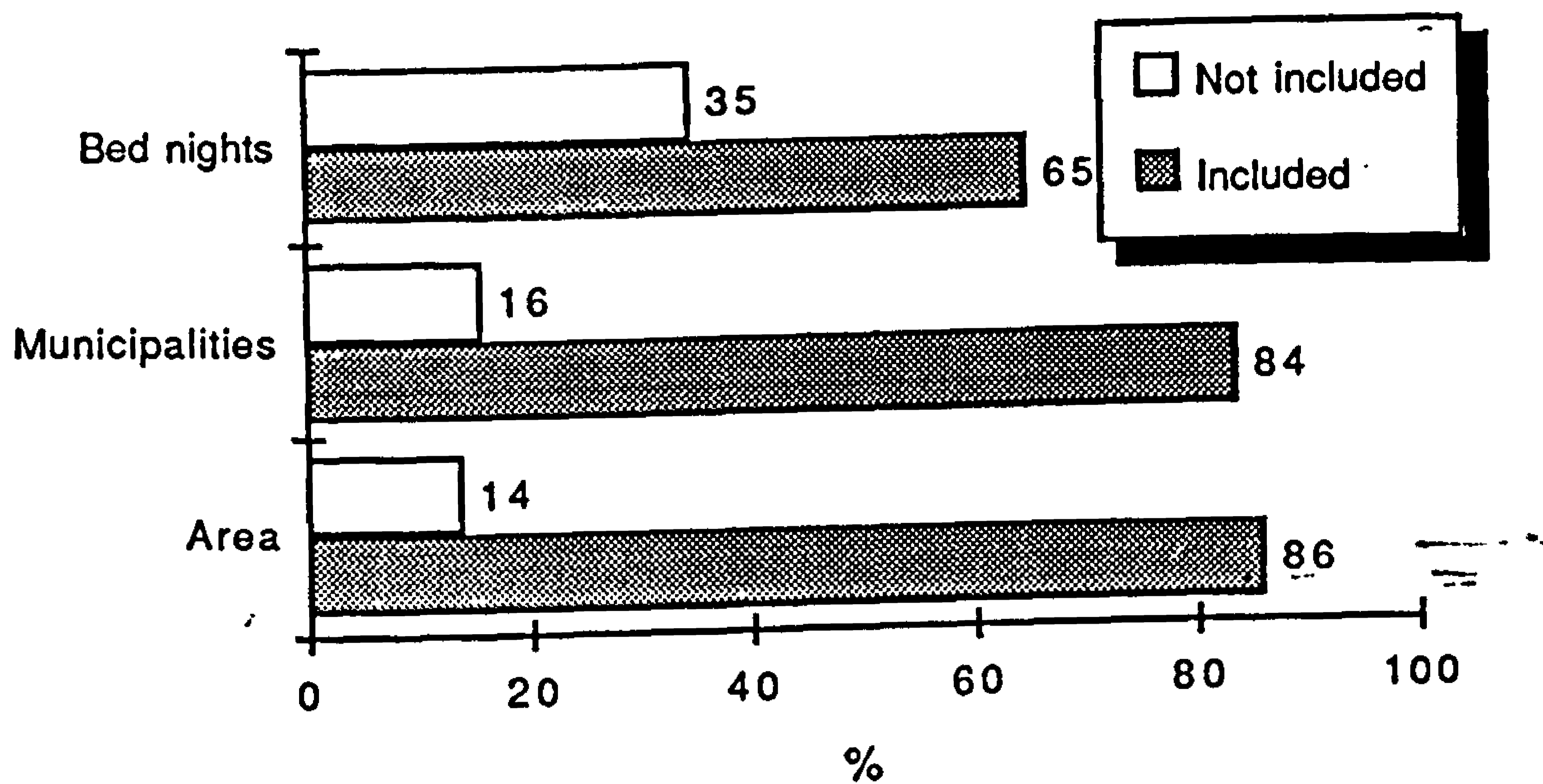
The debate which is presented in this section reports on information obtained from the 'postal questionnaires' and 'secondary information', while the discussion which is brought about by sections 7.3 and 7.4 sets out to examine the results which were obtained from the 'interview-questionnaires' (see sections 6.6 and 6.7). The only exception is section 7.2.2 ('Democracy and accountability of the methods used to appoint the members of the regional tourism commissions'), since, although included in this section, this piece of information was collected through the interview-questionnaires.

7.2.1 Characteristics of the Portuguese tourism boards

The regional tourism organisation in Portugal is under the responsibility of tourism boards (see section 5.3.2.5.3). However, Portugal is not fully covered by boards, since there are several municipalities which have decided either not to join a board or to include their tourism departments in local organisations called Tourism *Juntas* and Municipal Commissions for Tourism (see section 5.3.2.5.4). There are also other situations in which there is no particular tourism department, either at regional or local level, responsible for tourism affairs (for an expanded analysis see section 5.3.2.5).

As illustrated by map 5.6, in the mid-1990s there are 19 tourism boards operating in Portugal, which comprise 84% of the Portuguese municipalities, 86% of the territory as well as 65% of the tourism bednights spent in tourism accommodation (e.g., hotels, apartments, guest houses, camping, etc) (see figure 7.1). Particular reference should be made to the fact that 35% of the tourism bednights spent in Portuguese tourism accommodation are not under the umbrella of the strategies implemented by any regional tourism board, and it has been seen in this thesis that particular emphasis should be placed on regional tourism administrations since they offer the right platform not only to lead to an efficient and effective coordination of the tourism sector but also to tackle the impact of the tourism industry on the destination areas (see chapter 2).

Figure 7.1 - Share of municipalities, area and tourism bednights covered by the Portuguese RTBs

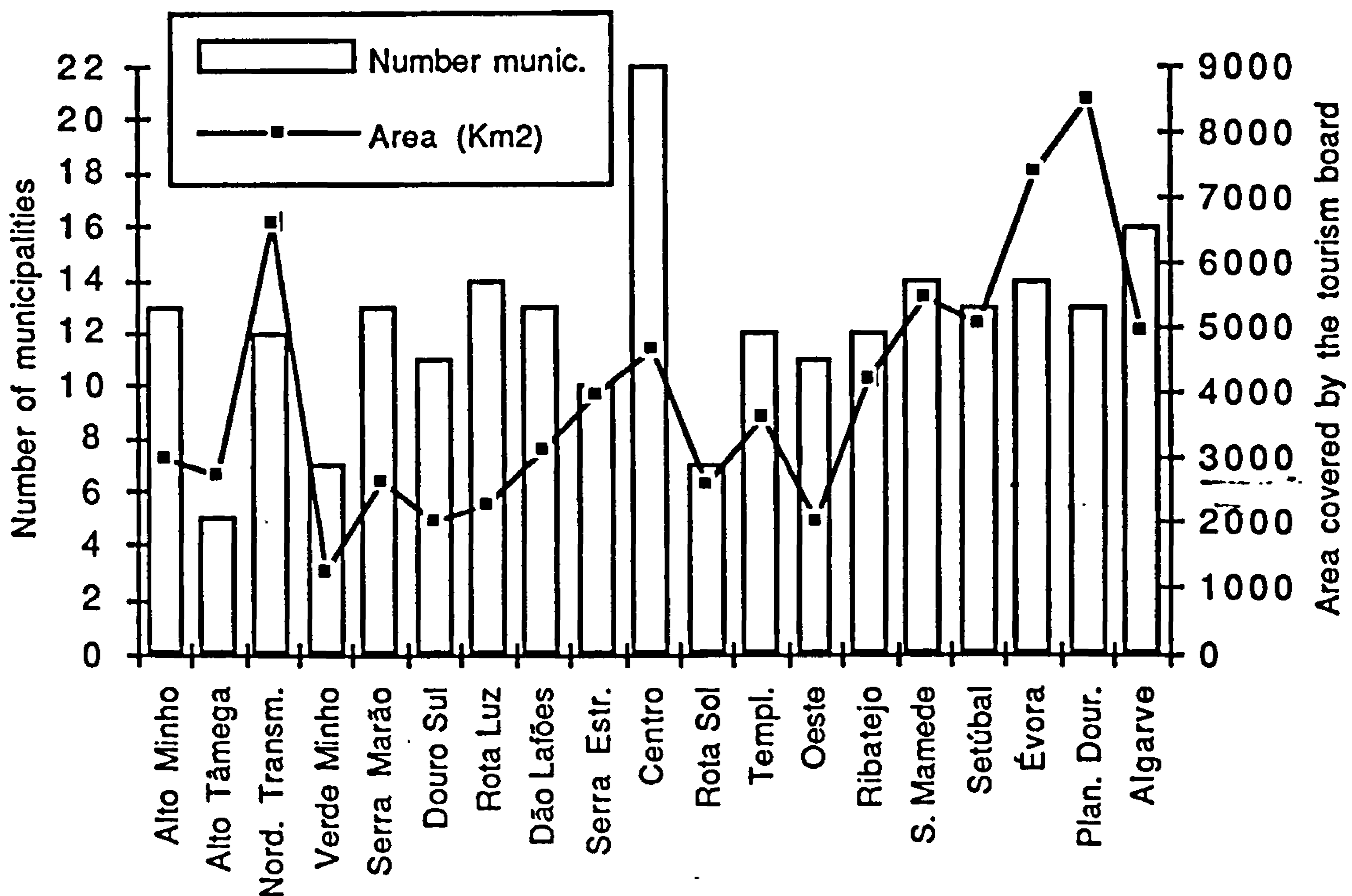


Source: DGAA (1993) (secondary information)

As a result of the flexibility of Portuguese legislation the size of tourism boards may be variable both in terms of the number of municipalities and area (see figure 7.2 and map 5.6). For instance, the average tourism board is based on the association of 12 municipalities, but there are situations in which the number of municipalities linked to a board is only 7 (e.g., 'Verde Minho' and 'Rota do Sol') or even 5 (e.g., 'Alto Tâmega'); conversely there are also situations in which the number of municipalities linked to a board is 16 (e.g., 'Algarve') or even 22 (e.g., 'Centro'). As far as the area is concerned a similar situation may also be found: despite the fact that the average tourism board comprises an area of 3,991 Km², there are also smaller boards with areas of less than 2,000 Km² (e.g., 1,267 Km² in 'Verde Minho' and 1,992 Km² in 'Oeste'), as well as several larger boards, located in the Alentejo valleys (southern Portugal), which comprise regions of above 6,500 Km² (e.g., 6,595 Km² in Évora and 8,503 Km² in Planície Dourada). As will be seen later, the excessive flexibility in setting up tourist boards in Portugal has made them emerge not according to tourism reasoning but, instead, as a result of factors which are external to the functioning of the tourism sector such as 'political (in)compatibilities' and 'friendship' (see sections 7.3.13 and 7.4.3).

With regard to budgets several problems are also found in the way in which regional tourism organisations operate in Portugal (see figure 7.3). To start with, most boards operate with scarce resources, since their average annual budget amounts to a few PTE 144m (£0.57m). However, 82% of the boards deal with budgets of less than PTE 200m (£0.8m), while 36% of

Figure 7.2 - The Portuguese RTBs by number of municipalities and area



Source: DGAA (1993) (secondary information)

them have to manage to survive with less than PTE 100m a year (£0.4m). That is, there are only two boards whose budgets are above PTE 200m (£0.8m): the Setúbal tourism board (PTE 367m/£1.47m) and the Algarve tourism board (PTE 1.31bn/£5.24m). As will be seen later, the lack of resources with which most boards operate are seen as a result of the highly fragmented form of Portuguese regional tourism administration (see section 5.3.2.5.3) which greatly contributes to its inefficiency and ineffectiveness (see section 7.4.3).

In addition to the problem of the lack of resources, the operation of Portuguese regional tourism organisation is affected by a number of other issues (see table 7.1). For instance, in first place tourism boards depend excessively on money transferred from national government, which amounts to about 80% of their receipts. However, there are situations in which over 90% of the receipts come from national government, such as in the Nordeste Transmontano (97%), the Rota do Sol (95%) and the Alto Minho (92%). This situation is viewed as one of the main reasons which explain why national government interferes in the activities developed by the boards (for an expanded analysis see sections 7.3.8 and 7.4.3).

In second place, tourism boards generate receipts of less than 1.5% of their annual budget (table 7.1). However, there are situations in which the receipts created by the boards are even less than 1% (e.g., the Rota do Sol, the Algarve, the Nordeste Transmontano, and the Serra do Marão), a situation which has given ammunition to those who strongly criticize the boards for their inactivity and excessive dependence on the national government (see section 7.4.3).

In third place, about 21% of the budget is spent on salaries (table 7.1), which, according to many, is too much due to the small budgets with which the boards have to deal with. In addition to that, most of the staff working for the boards have low qualifications (88% of them have less than a degree, i.e. B.Sc. or Portuguese *Licenciatura* (B.Sc.+2years)) (see figure 7.4), as well as few qualifications to work in the tourism sector, since over 90% of the them do not have any qualification in tourism. Again, this is an issue which is viewed by many participants as a critical factor which prevents tourism administration from achieving better results (see section 7.4.3).

A fourth main subject which seems to influence negatively the way in which the boards operate in Portugal is related to the fact that, according to Portuguese legislation, tourism boards have to spend at least 50% of their budgets on promotion (Decree-Law nº 287/91), when it is widely known that the level of tourism development varies from region to region and, therefore, investment priorities are also likely to be different from place to place. For instance, following Miossec's model (Miossec, 1977), while in regions characterized by low levels of tourism development (e.g. the Green Coast, the Silver Coast, the Mountains and the Valleys) marketing and promotion may assume more importance than planning and development matters, the opposite may be applied to regions which have already reached a mature stage of development (e.g., the Algarve and the Costa do Estoril).

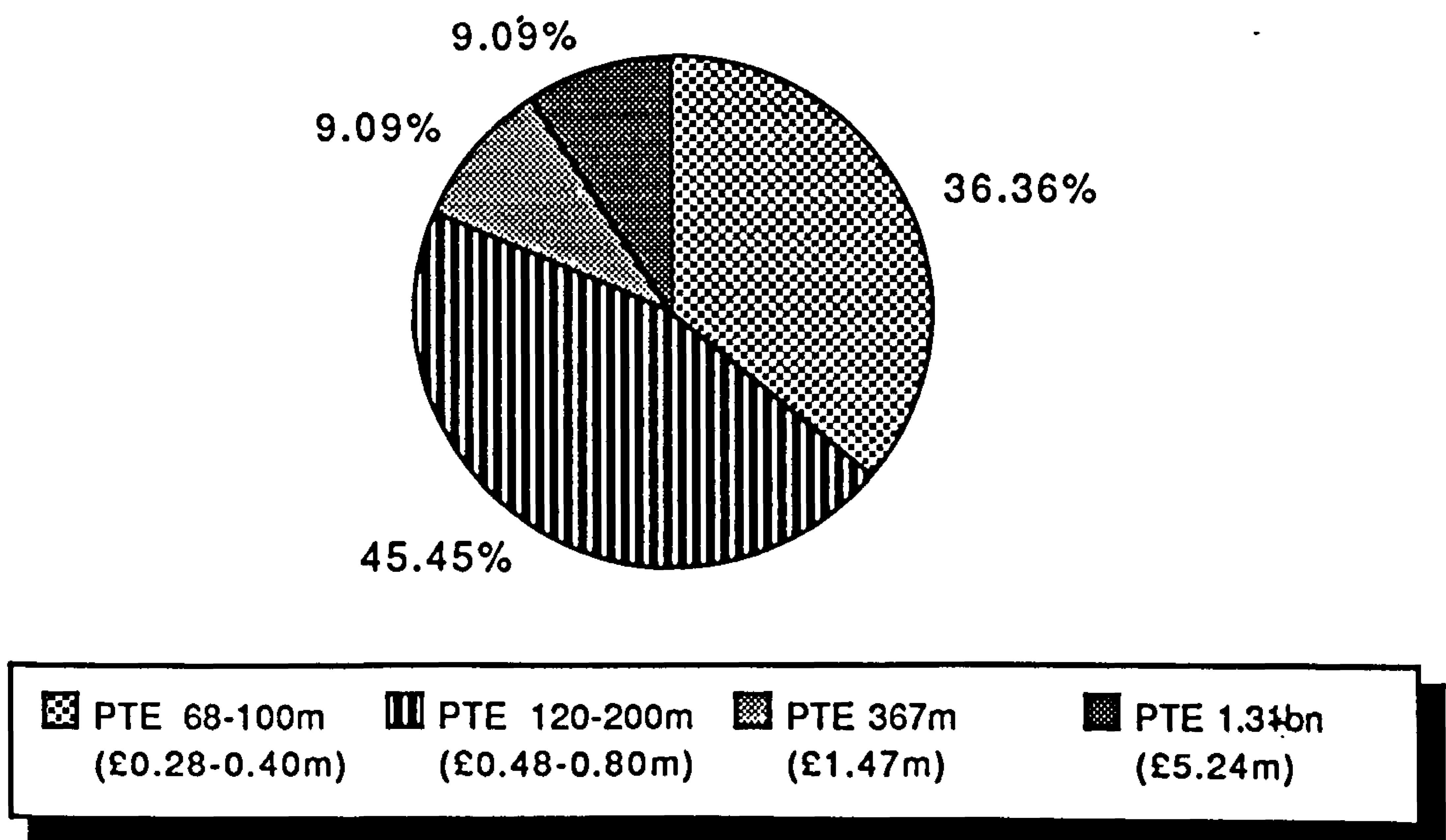
In addition to that, situations of profound mismanagement of resources may also be observed in a number of cases. For instance, among many other examples, the example of a board may be cited which in 1995 spent PTE 7,950,000 (£31,800) on 16 promotional actions abroad, in an average of PTE 497,000 (£1,988) per action. Similarly, a second example may be cited in which another board spent PTE 1,100,000 (£4,400) on a promotional action in Japan, as well as PTE 500,000 (£2,000) and PTE 600,000 (£2,400) on promotional actions undertaken in Luxembourg and Brazil respectively. Taking into account that a good slice of these resources is spent on travelling, accommodation and subsistence costs, the interest, efficiency and effectiveness of such activities should be questioned.

Finally, due to the shortage of money, lack of qualified staff, and excessive spending on administrative and promotional items, almost no resources are channelled into important areas

such as planning, research and development. Table 7.1 illustrates that tourism boards spend an insignificant share of 1.17% of their budgets on 'studies, projects and consultation'. That is, despite the importance which planning and development assume in the delivery of balanced and sustained forms of development (see chapter 2), what is found here is that most tourism boards do not demonstrate the capacity to intervene with efficiency and effectiveness in these areas. That is, it is shown that the strategy which is followed in Portugal is still centred on the attraction of growing numbers of tourists into the country (see figure 5.3), while little or even no emphasis is placed on the impact which such tourists, and the equipment and infrastructure which is associated with them, produce on the destination areas.

It is within this framework of reference that tourism boards operate in Portugal. As will be seen later, it is, nevertheless, recognized by most of the organisations involved in the tourism sector that tourism boards may play an important role in the regional tourism organisation by stimulating and coordinating the tourism development process within their regions (for an expanded analysis see sections 7.3.14 and 7.4.2). Despite that, strong criticism is also raised against the way in which they operate as a result of their small size, limited budgets, lack of qualified staff, excessive spending on administration and on ineffective promotional activities as well as the little attention which RTBs pay to planning and development (for an expanded analysis see section 7.4.3).

Figure 7.3 - Budget of the RTBs



Source: Postal questionnaire (see Appendix III)

Table 7.1 - Structure of the budget of the RTBs

	Budget (PTE x10 ³) (£=PTE250)	Receipts		Expenses on personnel (PTE x10 ³) (d)	Expenses on studies - and consultation (PTE x10 ³) (g)
		Transferred from national government (PTE x10 ³) (e)	Own receipts (PTE x10 ³) (f)		
Rota da Luz (b)	192,684 (£0.77m)	175,454 91%	10,200 5.29%	58,995 31%	10 0.01%
Alto Minho (b)	139,290 (£0.56m)	91,800 66%	4,500 3.23%	51,609 37%	0 0.00%
Algarve (b)	1,309,750 (£5.24m)	835,850 63.82%	7,250 0.55%	263,700 20%	0 0.00%
Setúbal (b)	366,600 (£1.47m)	325,400 89%	10,150 2.77%	51,200 14%	2,500 0.68%
Rota do Sol (b)	124,910 (£0.50m)	118,448 95%	20 0.02%	33,455 27%	1,750 1.40%
Ribatejo (b)	71,840 (£0.29m)	51,250 71%	950 1.32%	17,155 24%	100 0.14%
Nord. Transmontano (a)	156,000 (£0.62m)	151,057 97%	600 0.38%	11,750 8%	0 0.00%
Planície Dourada (c)	137,350 (£0.55m)	n/a	n/a	n/a	25,000 18.20%
Templários (b)	95,500 (£0.38m)	87,500 92%	2,000 2.09%	18,170 19%	0 0.00%
Verde Minho (b)	68,830 (£0.28m)	64,020 93%	2,300 3.34%	23,030 33%	0 0.00%
Serra do Marão (b)	70,660 (£0.28m)	63,500 90%	620 0.88%	17,290 24%	2,500 3.54%
TOTAL	2,733,414 (£10.93m)	1,964,279 76%	38,590 1.49%	546,354 21%	31,860 1.17%

Sources: (secondary information)
 Região Turismo da Rota da Luz (1994); Região Turismo do Alto Minho (1994); Região Turismo de Setúbal (1994); Região Turismo do Algarve (1994); Região Turismo da Rota do Sol (1994); Região Turismo do Ribatejo (1994); Região Turismo do Nordeste Transmontano (1993); Região Turismo dos Templários (1994); Região Turismo da Planície Dourada (1994); Região Turismo do Verde Minho (1994); Região Turismo da Serra do Marão (1994)

(a) 1993

(b) 1994

(c) 1995

(n/a) not available

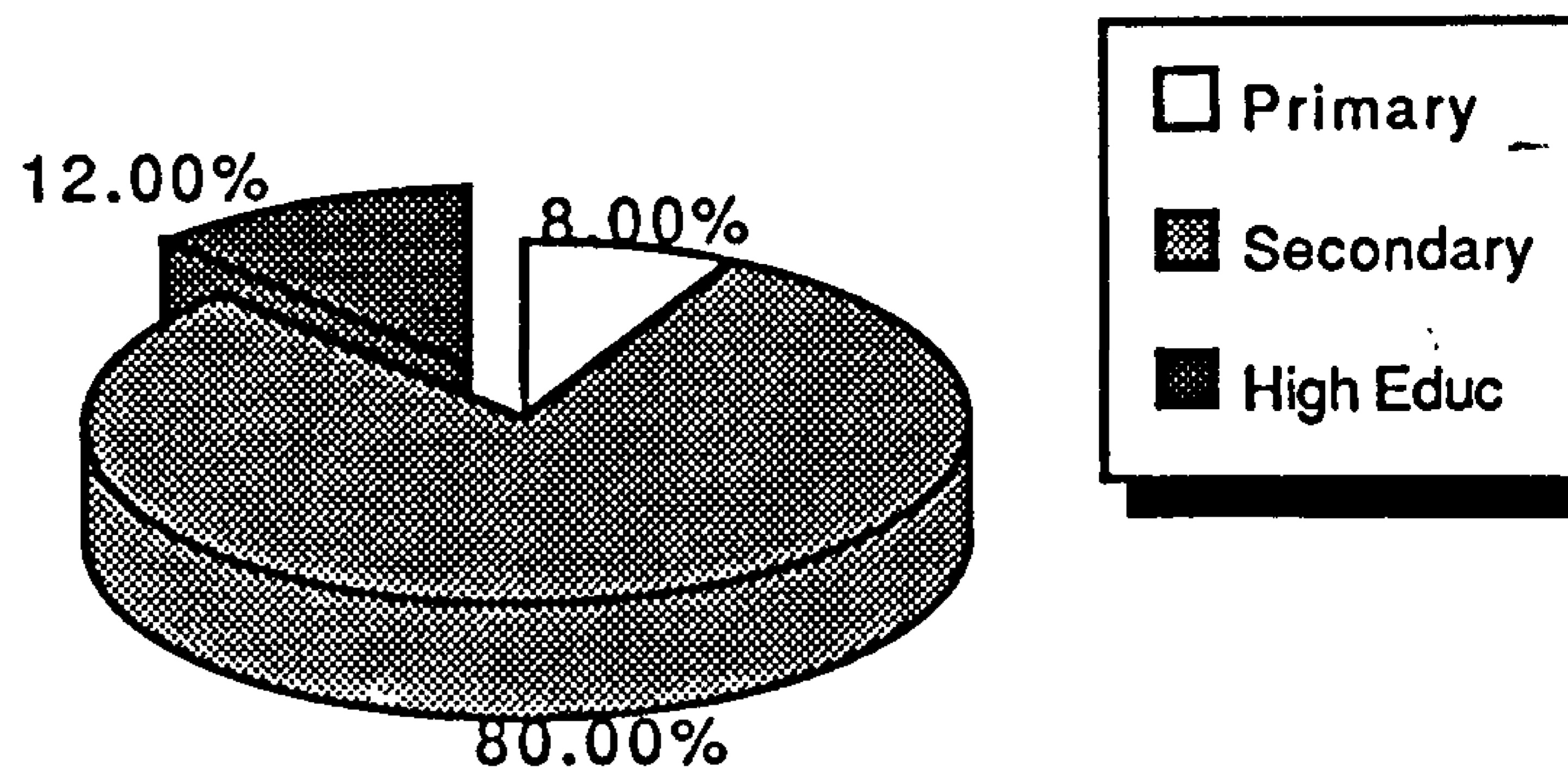
(d) Items included in the '01' code of the Portuguese Accountancy

(e) Items included in the '05' code of the Portuguese Accountancy (e.g., tourism VAT and transferences from public and private organisations)

(f) Items included in the '07' and '08' codes of the Portuguese Accountancy

(g) Items included in the '04.05' code of the Portuguese Accountancy

Figure 7.4 - Qualifications of the staff working for the Portuguese RTBs



Source: Postal questionnaire (see Appendix III)

7.2.2 Democracy and accountability of the methods used to appoint the members of the regional tourism commissions

Another important finding from this research, which has been obtained from the 'interview-questionnaires' conducted in Portugal, is linked to the methods by which tourism and non-tourism organisations appoint their members to the regional commissions. The results illustrate that most organisations follow different methods of appointing their representatives to the regional commissions, and while some of them are allotted on clear and democratic principles, others follow, instead, ambiguous and not very clear procedures (for an expanded analysis see also section 7.4.3). This situation is particularly important when, as stated by Hutchinson, *the allocation of public money is increasingly being undertaken through organisations and agencies which have not been elected by the public* (Hutchinson, 1994, p. 337) which often undermine their functioning.

For instance, the representatives of municipalities are either presidents or vice-presidents of municipalities, who are elected in local elections every four years. The remaining representatives of the public sector organisations are either elected within their organisations (e.g., universities and polytechnics) or appointed by the (elected) national government (e.g., CCRs DRARNs, etc). Therefore, the seats held by these representatives in the regional commissions are allocated on a democratic and legitimate basis. However, when the discussion moves to the private sector organisations a different scenario is found.

There are two main ways by which the representatives of private sector organisations are appointed to the regional commissions: they are either directly appointed by the tourism board president, who invites, for instance, a businessman to represent the travel agencies, hotels, restaurants; etc; or the tourism board president contacts a private sector association (e.g., association of rent-a-car, hotels, etc), and the association appoints someone to the regional commission. These methods are often used to appoint the representatives of the following private sector interests: travel agencies, hotels, rent-a-car, commerce and industry chambers, folklore, and unions.

However, there are several problems which undermine these procedures. To start with, it is highly questionable whether some associations are representative of the local entrepreneurs, since, in many situations, they have a small number of associates. Yet, because several associations in the same field are often found, the decision as to which association should be selected to appoint a representative becomes an issue, and, whatever the decision is, those members affiliated to different associations become excluded from the board. Furthermore, the area covered by most private sector associations is smaller compared to the region which is covered by the boards, and, therefore, they may not be representative of all entrepreneurs. Finally, whenever the representatives are appointed by the tourism board, their capacity to intervene and to criticize decisions taken by the board is reduced, which has prompted a climate of suspicion about the reasons which lead some presidents to appoint particular people to the regional commissions.

As a result of these problems the following main issues and conflicts were detected. Firstly, there are situations in which some entrepreneurs do not accept their representatives, and, as a result of that, decide to leave the board. Secondly, whenever the private sector representatives are appointed by private sector associations, instead of being appointed directly by the local businesses, they do not feel motivated to enter dialogue and to discuss their activities with their local colleagues, since they do not have to report their work to anyone and are not motivated to do a good job; in addition to that, they may also become more vulnerable to manipulation.

As will be seen later these problems affect the way in which the representatives of the private sector are viewed within the regional tourism organisation by their public sector counterparts. That is, despite all their potential and importance (for an expanded analysis see section 7.3.14) it is nevertheless found that the lack of democracy and accountability of the representatives of private sector organisations undermine their participation within the tourism boards (for an expanded analysis see sections 7.3 and 7.4.3).

7.2.3 Size of the organisations represented in the regional tourism commissions by number of employees

As will be seen further, the size of an organisation in terms of the number of employees may be seen as an (indirect) indicator of the strength of their influence on decisions taken by the boards. Bearing that in mind, organisations were clustered into different groups according to their number of employees, and figure 7.5 schematically reproduces some of the main findings.

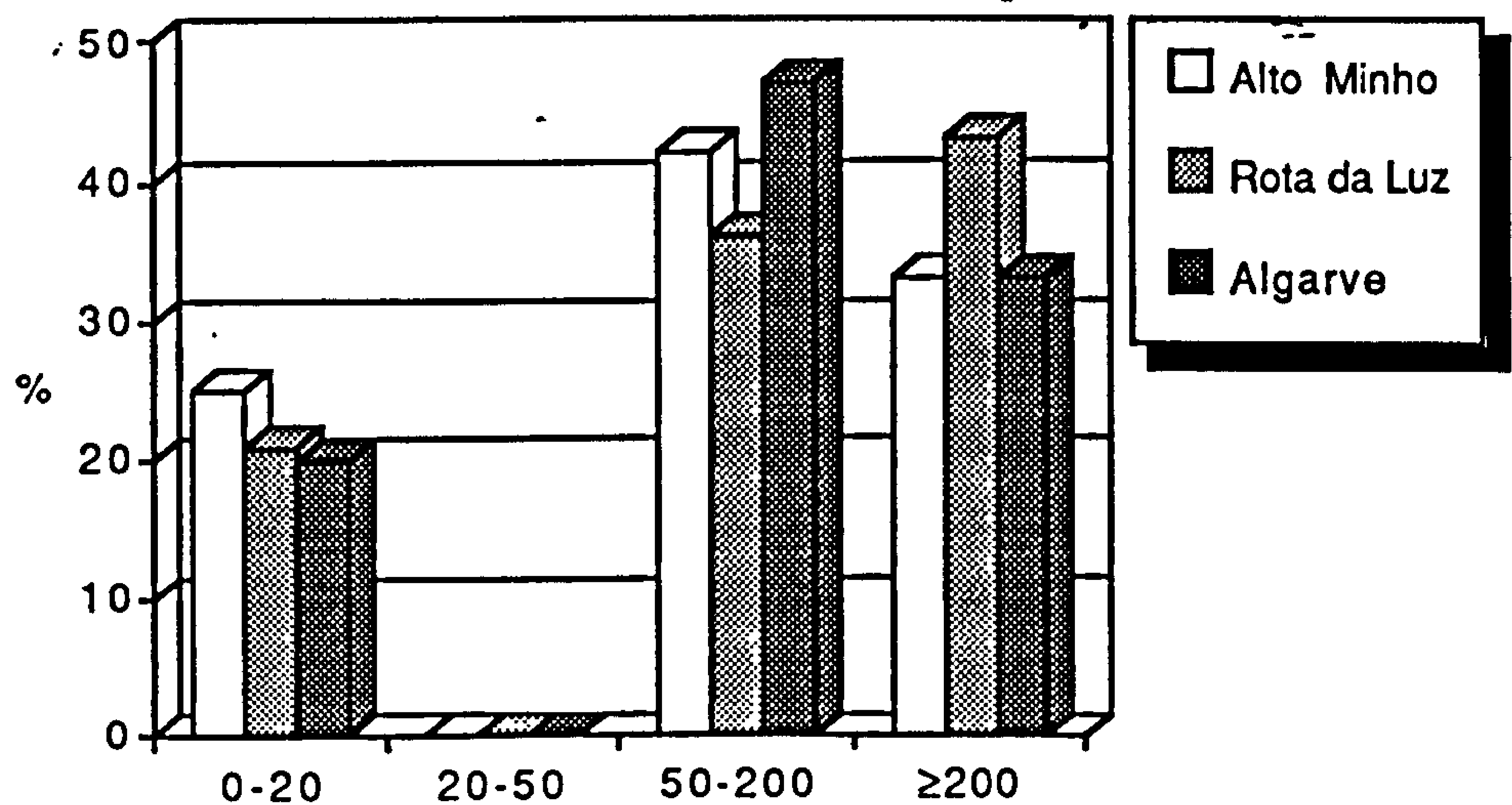
It is illustrated by the chart that there is a relatively large group of small size organisations (0 and 19 employees) which accounts for between 20% and 25% of the total number of organisations represented in the boards. Although not illustrated by the chart this cluster comprehends only private sector organisations, such as the representatives of travel agencies, rent-a-car, hotels, camping, commerce chambers, unions and most hotel associations. It also includes several representatives of private sector organisations appointed by the boards who, as a result of that, are not backed by any particular association (see also section 7.2.2).

The second, and also the largest, group comprises organisations the number of employees of which varies between 50 and 200 people. There are two main features which dominate the characteristics of this group. Firstly, it includes the vast majority of the municipalities located in the interior of Portugal, which, generally speaking, are characterized by lower levels of socio-economic and tourism development, difficult accessibility, and low population densities. For instance, the municipalities located in the Alto Minho interior, such as Arcos de Valdevez and Melgaço are included in this group; and, municipalities located away from the Rota da Luz and the Algarve littoral areas, such as Vale de Cambra, Castelo de Paiva, Albergaria, and Monchique, Castro Marim, Aljezur, are also part of this group. Secondly, it also comprehends medium size public sector organisations, such as port authorities (e.g., JAPA and Port Authority (DGM) in the Rota da Luz region), polytechnics (e.g., the Algarve polytechnic), as well as some planning and environmental commissions (e.g., the Algarve regional planning and environmental commissions (CCRA and DRARN)).

Finally, there is a third group of large size organisations which employ over 200 people. This cluster comprises all areas (municipalities) located in the littoral areas, which are characterized by higher levels of socioeconomic and tourism development as well as by excellent accessibility (e.g., Portimão, Lagoa, and Vila Real Santo António in the Algarve; Aveiro and Ovar in the Rota da Luz; and Viana do Castelo, Barcelos in the Alto Minho). Besides, this group includes large size public sector organisations, such as the powerful northern and central regional planning commissions (CCRN and CCRC); some regional environmental commissions (e.g., DRARN/North); and national government agencies (e.g., Ministry of Transports).

These results are particularly important since, and as will be seen later, there is a correlation between the size of an organisation and its capacity to influence decisions. For instance, this thesis will show further that partially as a result of their size, private sector organisations have little capacity to influence decisions (see section 7.3.9), which has made them assume a peripheral role within the regional tourism organisation (see section 7.3.3).

Figure 7.5 - Size of the organisations represented in the regional tourism commissions by number of employees



Source: Postal questionnaire (see Appendix III)

7.2.4 Size of the organisations represented in the regional tourism commissions by budget

Figure 7.6 provides a schematic representation of the size of the organisations represented in the regional tourism commissions by budget. As will be seen below there are several similarities between the findings obtained from this chart and the results discussed in the previous section (see figure 7.5).

The chart illustrates that, similarly to figure 7.5, there is a well identified cluster of small size organisations which account for between 13% and 20% of the total number of organisations represented in the regional tourism commissions. This group is characterized by two main aspects: firstly, all the organisations are small in size, since their budget amounts to less than

PTE 20m (£0.08m); secondly, the group only comprises private sector 'organisations', such as the vast majority of the hotels, catering and rent-a-car representatives, who are not backed by any particular association (see section 7.2.2), as well as other very small private sector associations, such as chambers of commerce and unions.

The second group of organisations, which accounts for between 25% and 31% of the total organisations, comprises medium size public sector agencies, whose budgets vary between PTE 60m and 1bn (£0.24m-£4m). This group includes all regional planning commissions (CCRs), regional environmental commissions (DRARNs), port authorities (e.g., DGM), the Alto Minho and the Rota da Luz boards, as well as the association of the Algarve hotels (AIHSA), which, due to the high level of tourism development in this region, is bigger than the other hotel associations represented in the Alto Minho and Rota da Luz boards.

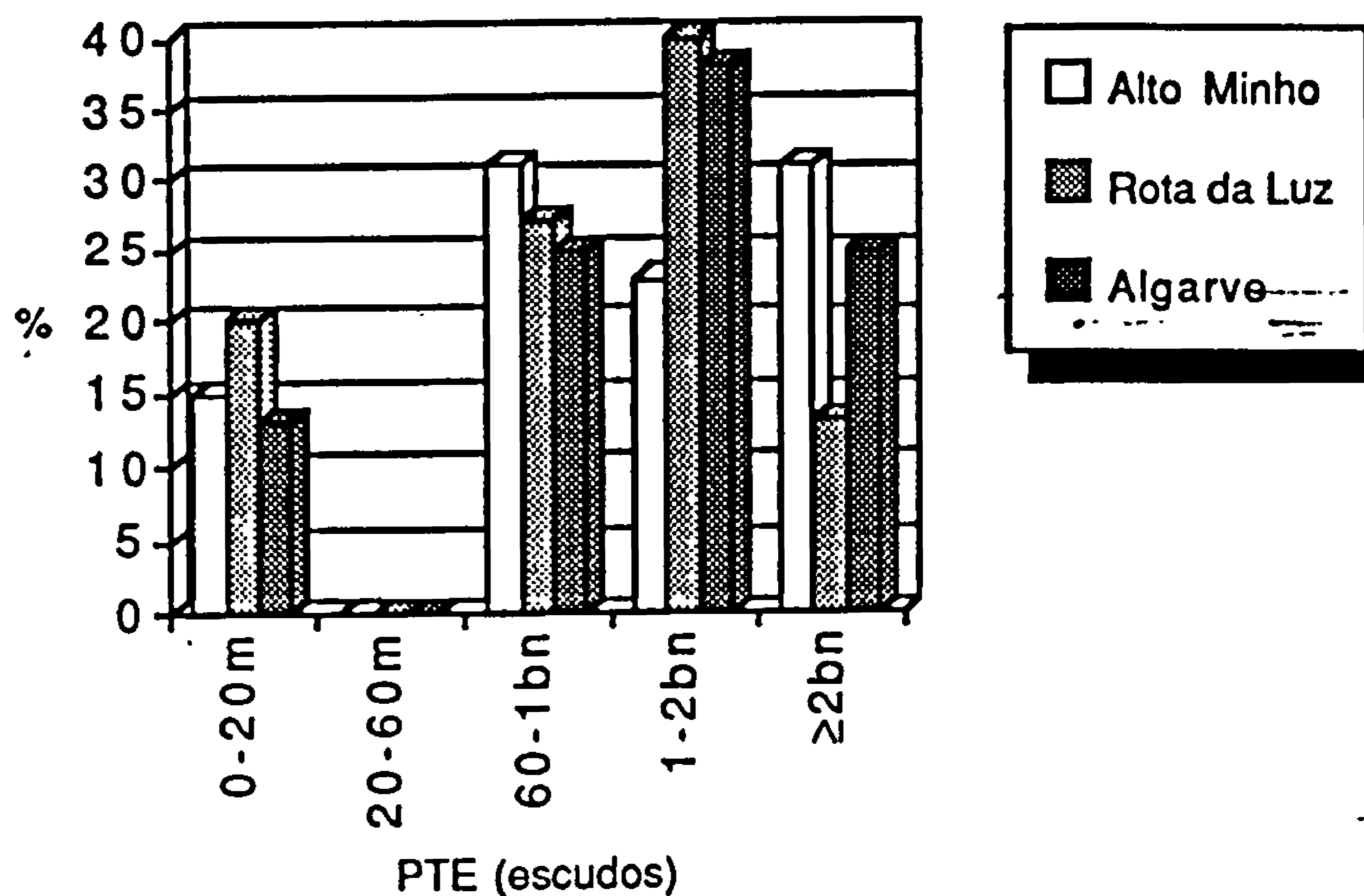
There is yet a third group of organisations, whose budgets amount to between PTE 1bn and 2bn (£4m-£8m). Most of the organisations which are included in this group are characterized by either their location in the inland areas (e.g., Vale Cambra, Castelo Paiva, Terras Bouro, Melgaço, Monchique, Castro Marim, Aljezur and Silves), or by lower levels of socioeconomic development (e.g., Albergaria, Estarreja and Vila Nova Cerveira). In addition, this group includes the Algarve tourism board which, as a result of the high level of tourism development in the region, operates with a budget of about PTE 1.5bn (£6m), which is, roughly speaking, 10 times the budgets which the Alto Minho and the Rota da Luz boards deal with (PTE 150m, i.e., £0.6m).

Finally, there is a fourth group of organisations whose budgets amount to over PTE 2bn (£8m). As discussed in the previous section, this cluster consists of municipalities located in the coastal areas and is, therefore, characterized by higher levels of socioeconomic and tourism development (e.g., Aveiro, Ovar, Viana Castelo, Barcelos, Valença, Portimão, Lagoa and Faro), whose budgets range from PTE 2bn and 7bn (£8m-£28m), and of national organisations, such as the Ministry of Transport (PTE146bn/£584m), whose budgets are well above the resources available in other regional and local organisations.

As discussed in section 7.2.3 the size of an organisation provides an indirect measure of its strength to influence decisions taken not only by the boards but also by its counterparts. For instance, as a result of their small size, as well as other problems (see, for instance, section 7.2.2), private sector organisations have few links to other organisations (see section 7.3.1), lower levels of prominence (see section 7.3.3), and lower capacity to influence decisions, even if their importance to the tourism organisation is recognized across all organisations (see section 7.3.14). Likewise, medium size public sector organisations (e.g., municipalities located in the

interior) are also less prominent, more peripheral, and show a smaller capacity to influence decisions than other larger public sector organisations (e.g., municipalities located in the littoral).

Figure 7.6 - Budget of the organisations represented in the regional tourism commissions



Source: Postal questionnaire (see Appendix III)

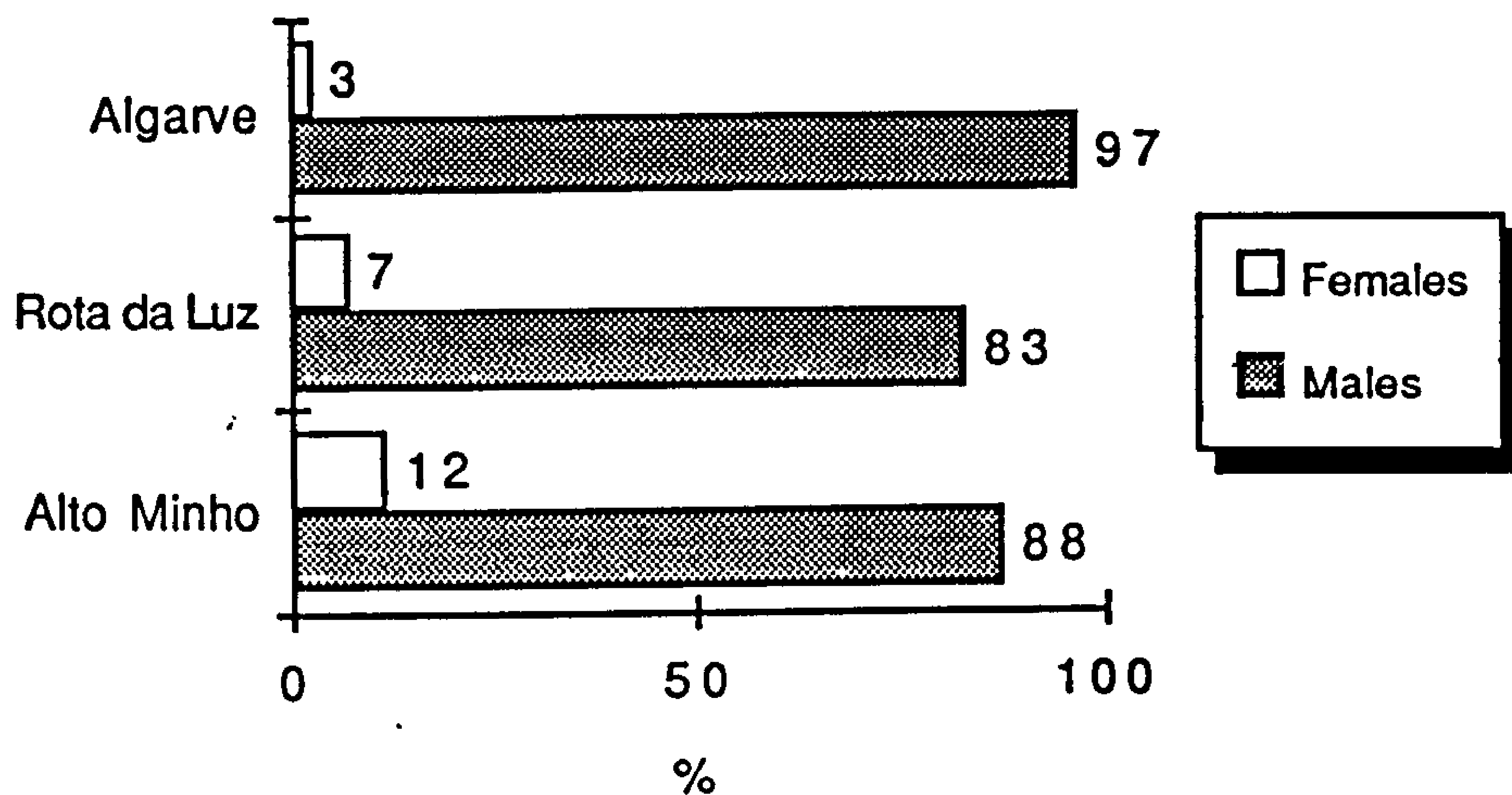
7.2.5 Members of the regional tourism commissions by gender

After having discussed some of the characteristics of the organisations represented in the regional tourism commissions, it is worth providing now an insight into some of the traits of the individuals who represent such organisations.

As far as the gender is concerned it is found that the Portuguese regional tourism boards are largely dominated by males (about 93%) (see figure 7.7). For instance, the proportion of women in the Algarve regional tourism commission is only 1/33 (3%), while in the other boards the situation is not very different: 2/29 in the Rota da Luz (7%) and 3/25 in the Alto Minho (12%). However, these results are not different from other areas since, for instance, only 8% of the Portuguese MPs and 6% of the presidents and vice-presidents of municipalities are females (see Expresso, 1995). This means that despite the larger proportion of women with higher education in Portugal, in the end only a few reach top levels within public sector administration, the reason why, with regard to this area, the UN ranks Portugal only as the

world's 30th most developed country (see Expresso, 1995). This issue may assume particular importance principally among those who defend more equilibrium in terms of gender in the way in which organisations are run.

Figure 7.7 - Members of the regional tourism commissions by gender



Source: Postal questionnaire (see Appendix III)

7.2.6 Members of the regional tourism commissions by age

As far as the age of the individuals responsible for the regional tourism organisation is concerned a statistical analysis was also carried out and some of the results are schematically represented in figure 7.8.

It is illustrated by the chart that while in the Algarve all the representatives are aged over 35, 20% and 18.2% of them in the Rota da Luz and the Alto Minho respectively are aged less than 34. Furthermore, it is also seen that whilst 61.5% and 46.7% of the representatives in the Alto Minho and the Rota da Luz respectively are aged less than 44, in the Algarve only 25% of them are included in this group, since the vast majority of the members of the Algarve regional tourism commission is aged between 45 and 54 (68.8%). In addition to that, it is found that despite the fact that the Rota da Luz has a large share of representatives aged less than 35 (46.7%) it is also in this region that the largest percentage of members aged over 55 is observed (26.7% compared to 6.3% in the Algarve and 7.7% in the Alto Minho).

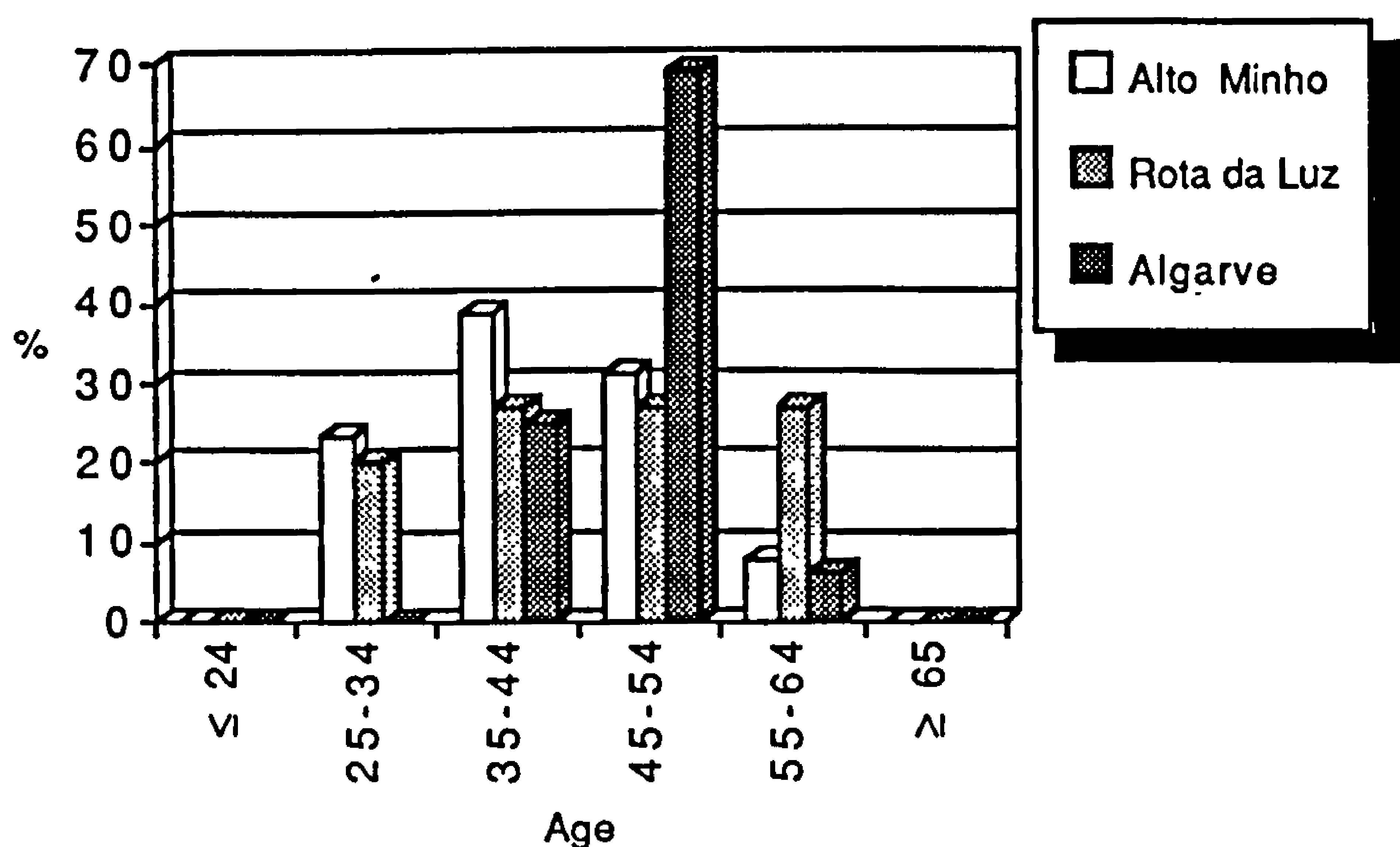
Although not illustrated by the chart, several differences may also be seen in terms of the distribution of this variable by type of organisation. A chi-square test shows that the variable

age is not normally distributed across municipalities, public and private sector organisations and tourism board presidents (chi-square = .01152), which may be explained by the fact that all tourism board presidents are aged over 45; all representatives of public and private sector organisations are over 35; and all representatives aged less than 35 come from municipalities.

While analysing the composition of regional tourism organisation by age it was believed that this variable could be used to explain the willingness of tourism participants to accept the introduction of changes into the way in which tourism administration operates. However, what will be seen further is the fact that the criticism pointed out at the inefficiency and effectiveness in which tourism boards operate (see sections 7.3 and 7.4.3), and the sensitivity demonstrated by participants to the introduction of changes into the present administration (see, for instance, sections 8.2.1, 8.2.2 and 8.2.17), are variables which are independent of the age of the members of tourism administration.

Therefore, these data will help to confirm these situations, and may also be useful for other researchers interested in a comparative analysis of the tourism administration in other countries.

Figure 7.8 - Members of the regional tourism commissions by age

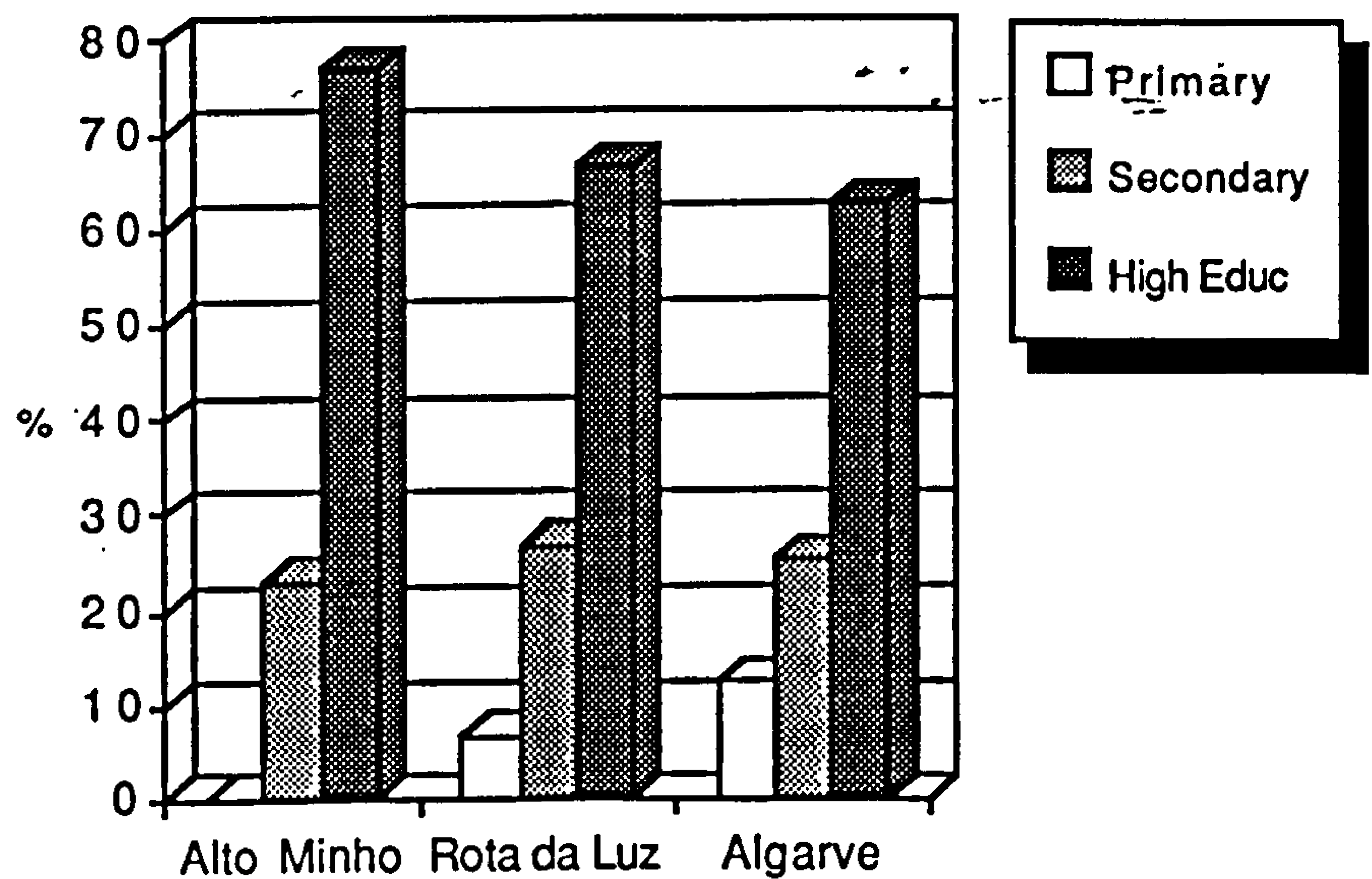


Source: Postal questionnaire (see Appendix III)

7.2.7 Qualifications of the members of the regional tourism commissions

With regard to the qualifications of the members of the regional tourism commissions it is shown by figure 7.9 that the vast majority of them have either a B.Sc. or a Portuguese *Licenciatura*²¹ (B.Sc.+2years), i.e. high education (76.9% in the Alto Minho; 66.6% in the Rota da Luz; and 62.5% in the Algarve).

Figure 7.9 - Qualifications of the members of the regional tourism commissions



Source: Postal questionnaire (see Appendix III)

In addition to that it is also found that most members of the regional commissions have different educational backgrounds, which brings evidence to the argument that tourism is a meeting point of a wide scope of interests and activities (see section 1.4). For instance, the analysis of the three tourism boards shows that 'civil engineering' accounts for 13% of the background of the members of the regional commissions with high education, followed by 'teacher of primary school' (10%); 'economics' (10%); 'accountancy' (10%); 'law' (10%); 'hotel management' (7%); 'agronomy' (7%); 'environmental engineering' (7%); 'history' (7%); 'languages' (7%); 'management' (3%); 'politics' (3%); 'sports' (3%); 'military science' (3%); 'anthropology' (3%); 'philosophy' (3%); and 'chemistry' (3%).

²¹ *Licenciatura* is a five years course offered by the vast majority of the Portuguese universities. Compared to a *Licenciatura*, a BSc is shorter (3 years course) and is usually run in polytechnics.

As far as the background in tourism education is concerned it is found that, although dealing with tourism matters, the vast majority of the members of the regional tourism commissions do not have any particular background in this field, since only 3/25, 3/33 and 1/29 of the members of the Alto Minho, the Algarve and the Rota da Luz tourism commissions respectively, attended courses in tourism (see figure 7.10). In relation to the 7 individuals (8.05%) who did courses in tourism, 3 of them (3.45%) had taken a three year course in hotel management, and one of them (1.15%) completed a one year course in tourism marketing and management. The remaining three cases (3.45%) did some very short tourism courses (two weeks course) in entertainment and animation.

In conclusion, the results which are discussed in this section show, first of all, that most tourism participants have skills in a number of areas, which offers good prospects for the establishment of rich and informed regional tourism policies. In second place, the high level of education of most tourism participants also helps to explain why they are so aware of the inefficiency and ineffectiveness of the way in which tourism boards operate in Portugal (see section 7.3 and 7.4.3), and also why they welcome so enthusiastically alternatives capable of improving its functioning (see chapter 8).

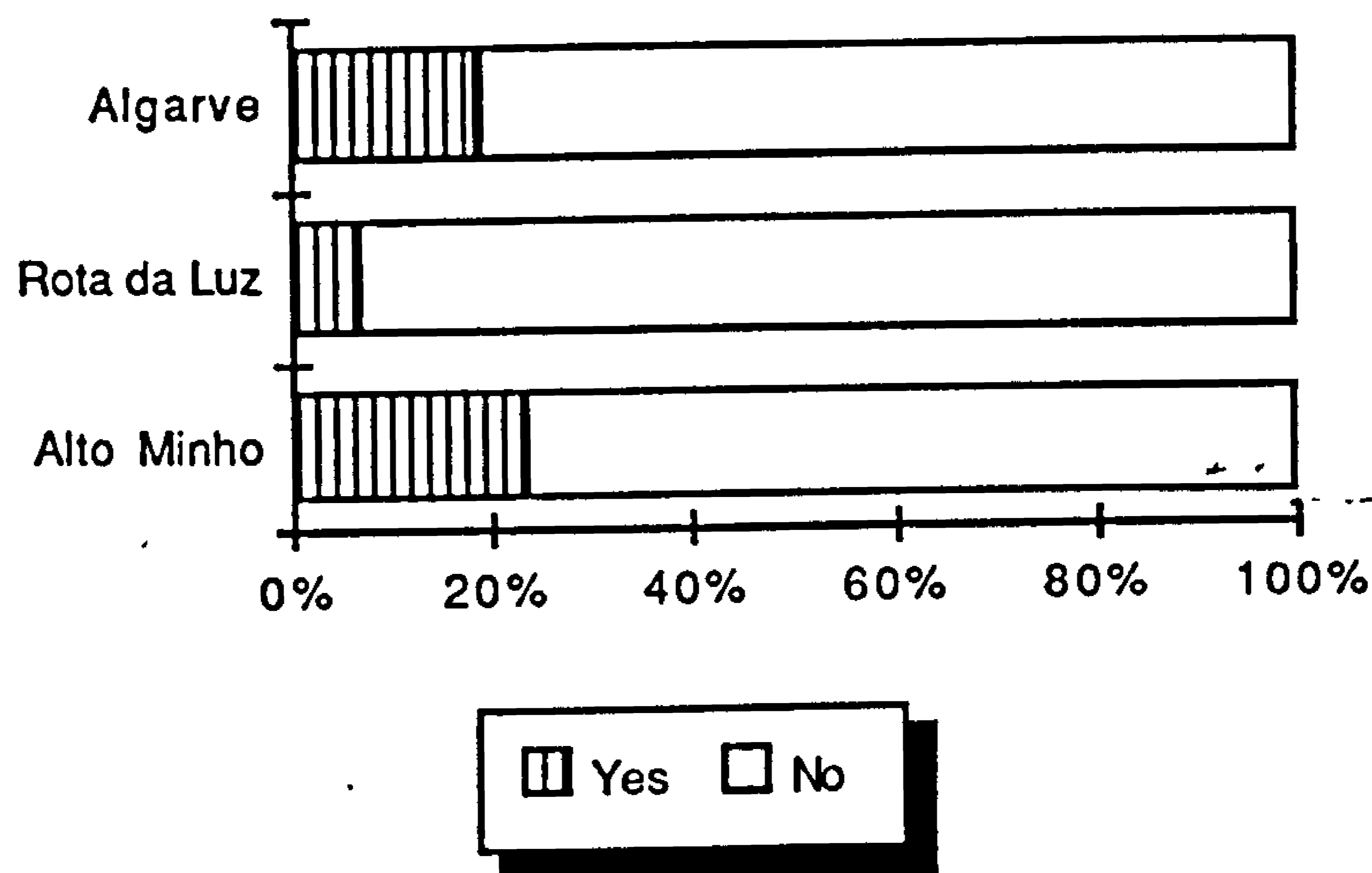
Furthermore, these results also bring empirical evidence to the argument which is presented in this thesis, as well as in other tourism literature, that the tourism sector is a meeting point of a wide scope of interests and backgrounds (see section 1.4). With regard to this, this thesis also brings evidence that supports some arguments presented in tourism education literature, where it is pointed out that, the tourism sector being a meeting point of a wide spectrum of disciplines, education in tourism should comprise the wide scope of areas which are linked to the sector (see Cooper et al, 1994).

As far as the last point is concerned, this thesis brings evidence which supports the argument brought about in section 5.3.2.5.2, when it was stated that the present policy for tourism education in Portugal is inadequate, since the Portuguese government, through the official agency responsible for tourism education (NITT), has adopted a policy in which tourism education is viewed only as education in hospitality, while areas such as planning, development, economics, marketing, sociology, environment, and so on, are not viewed as taking priority.

Finally, these findings also unveil the fact that despite the importance and peculiarity of the tourism industry, the Portuguese tourism sector is dominated by outsiders with no particular background in the field, when nowadays it is recognized that one of the priorities which ought

to be brought into the field, if tourism is to succeed, is to *eliminate amateurism at all levels* (WTO, 1994a, p. 78).

Figure 7.10 - Education in tourism of the members of the regional tourism commissions



Source: Postal questionnaire (see Appendix III)

7.3 Characteristics of the contacts established among the organisations responsible for the tourism sector at the regional level

Another objective which is proposed in this thesis is to analyse the characteristics of the operation of Portuguese regional tourism administration, and evaluate ways in which it may be improved in the future ('administrative component' - see section 6.2/figure 6.1). While the information discussed previously was gathered from 'secondary sources' and by 'postal questionnaires' ('descriptive analysis'), the material which is debated in this section was collected through 'interview-questionnaires', since it consists of data focussing on the way in which organisations are run as well as in the way in which they interact with other partners in the network ('relational analysis'), such as inter-organisational coordination of policies; levels of influence; reason and frequency of contact; compatibility of goals and operating philosophies; etc (for an expanded analysis of the differences between 'descriptive' and 'sociometric' analysis see section 6.4).

One of the characteristics of sociometric analysis is the great level of creativity in the way in which data is analysed. It will be seen from the following sections that several methods of

analysing the information which was collected in Portugal were used (e.g., sociograms, mathematical equations, cluster analysis, proximity measures, descriptive analysis, and tests). The reasons why these techniques were chosen for this thesis may be found in section 6.8.

7.3.1 Levels of connectivity among organisations, groups of organisations and tourism boards

Figures 7.11, 7.12 and 7.13 are sociograms which show the way in which the members of the Alto Minho (RTAM), the Rota da Luz (RTRL) and the Algarve (RTA) tourism commissions are linked to each other within their regions to deal with tourism matters. Circles stand for organisations (actors/nodes) whereas arches represent contacts established among organisations (see section 6.8.2).

At first sight these sociograms (qualitative information) appear difficult to interpret due to the density of arches surrounding some nodes, and, therefore, the analysis will be complemented with other techniques discussed in section 6.8.2 (quantitative information). Despite that, these sociograms also provide a full picture of the web of relationships established among the organisations included in the three tourism boards.

The charts show that the number of arches (which stand here for contacts established among the organisations for tourism purposes - see Q2, Interview-Questionnaire, Appendix II) vary from board to board, because while some organisations are linked to other nodes by many edges others are linked to other organisations by a few arches. A comparison of the three boards may also raise the question of why the connections set up among the organisations vary from board to board; for instance, the sociograms seem to suggest that organisations are more closely tied to each other in the Algarve tourism board than in the Alto Minho and the Rota da Luz boards.

Although providing a first, and useful, approach to a problem sociograms must also be analysed with the help of quantitative analysis for the following reasons (see also section 6.8.2). Firstly, larger boards are likely to be characterized by denser webs of relationships, and, therefore, what is observed at first sight may be only an illusion. Secondly, since these charts are handmade, some arches might have (deliberately?) been placed at some places, which may transmit the faulty idea of higher density of contacts when in practice that may be not true. Bearing these shortcomings in mind it was then decided to complement, and double-check, the information provided by these sociograms (qualitative information) with a quantitative analysis ('triangulation'), the results are presented in tables 7.2 to 7.14.

With regard to the number of contacts (connectivity) it is observed that they vary between 2 and 24 in the Alto Minho (table 7.2); 1 and 28 in the Rota da Luz (table 7.5), and 1 and 32 in the Algarve (table 7.8). However, because these boards include a different number of organisations some weighted figures must also be computed in order to make them comparable, which may be done by using the index of connectivity (IC) (see equation 5.1) (see tables 7.2 (Alto Minho), 7.5 (Rota da Luz), and 7.8 (Algarve)).

As far as the Alto Minho tourism board is concerned it is possible to observe that the IC reaches its lowest value (8%) across all groups of organisations, that is municipalities (e.g., Monção), private sector organisations (e.g., Travel Agents) and public sector organisations (e.g., Port Authority) (see table 7.2). However, an insight into the information provided by the tables also suggests that the lowest levels of connectivity are associated with private and public sector organisations. In order to assess whether this claim is true organisations were clustered according to their indexes of connectivity (see table 7.3). The results obtained show that, excluding Monção, all municipalities reach ICs above 10%, whereas 5 organisations belonging either to the private or public sectors register ICs below 10% (i.e. two contacts only).

These findings seem to suggest that private and public sector organisations have lower levels of connectivity within the network than municipalities. Bearing that in mind, information was further analysed by type of organisation, for which the index of connectedness was computed (CG) (equation 5.4) (see table 7.4). The results obtained illustrate, first, that the tourism board is linked to all members of the regional commissions (CG=1.00); however this is an expected finding since all tourism boards are connected to all organisations through the regional tourism commissions. Therefore, what should be discussed later is whether such connections are efficient and effective (for an expanded analysis see sections 7.3.5 to 7.7.14).

Secondly, the results also show that private sector organisations have the lowest level of connectedness within the regional tourism organisation (0.15). However, such a situation is not surprising if one again take into account the information provided by tables 7.2 and 7.3, which illustrate that the chamber of commerce is the only private sector agency linked to 6 other organisations (IC=25%), while all the other private sector associations register values below 15% (e.g., industry chamber and hotel association (13%); and the representatives of catering and travel associations (8%)).

Finally, taking into account the differences of connectivity by type of organisation a test was computed in order to examine whether the contacts established within the Alto Minho tourism board have a normal distribution. By the use of a Kolmogorov-Smirnov goodness test it is found that the variable 'contacts' do not follow normal distribution across the whole sample

collected in the Alto Minho board ($K-S=0.0182$). However, the same test was computed individually for each group of organisations and figures of .2645, .1594 and .5784 were obtained for the municipalities, the public and private organisations respectively, which shows that the variable 'contacts' is normally distributed by type of organisation.

It is important analysing now whether similar findings are obtained in the other regions. As far as the Rota da Luz tourism board is concerned a similar statistical analysis was conducted and the results are presented in tables 7.5 to 7.7: table 7.5 brings information about the number of ties and indexes of connectivity; table 7.6 provides data about the indexes of connectivity by clusters of organisations; finally, table 7.7 shows the results obtained for the index of connectedness by type of organisation.

A first important finding brought about by table 7.5 is linked to the fact that, in comparison to the Alto Minho board, there is a larger number of organisations connected to the network by a smaller number of ties. For instance, four actors are bound to the tourism organisation by only one arch (MCT, Sport, Union and Folklore), which means that in their absence they become completely disconnected from the network. An insight into figure 7.13 also shows that these actors are either public or private sector organisations and also that the tourism board is their only link to the tourism organisation. In other words, in the absence of the tourism board several public and private organisations become completely disconnected from the network (for an expanded analysis of this problem and its implications see section 7.3.2).

In addition to that table 7.6 illustrates that, compared to the situation observed in the Alto Minho board, there is a greater number of organisations in the Rota da Luz board whose indexes of connectivity (IC) are below 10%. Furthermore, it is also possible to observe that while in the Alto Minho board low levels of connectivity are typical of private sector organisations, in the Rota da Luz low levels of connectivity are also typical of several municipalities (e.g., Albergaria, Oliveira Bairro, Arouca, Castelo Paiva, Sever Vouga). As will be seen later this finding will help to explain the fact that municipalities located in the interior areas (less developed regions) tend to be less connected to the tourism organisation than other local authorities located in the coastal areas (more developed regions).

In addition to this, tables 7.5 to 7.7 also show that the indexes of connectivity found in the Rota da Luz board are lower than those observed in the Alto Minho. For instance, while the connectivity of the tourism board is 100%, for the reasons discussed above, the IC of private sector organisations is 10% (15% in the Alto Minho), while the IC of municipalities is 21% (26% in the Alto Minho). The only exception is found among the public sector organisations

which show an IC slightly above that of the one observed in the Alto Minho (22% in the Rota da Luz and 21% in the Alto Minho).

Taking into account the different way in which municipalities, private and public sector agencies are bound to the tourism organisation, a Kolmogorov-Smirnov test was computed to examine whether the variable 'contacts' is normally distributed across all organisations. Similarly to the results obtained in the Alto Minho board it is again found that the variable 'contacts' is not normally distributed in the sample collected in the Rota da Luz board (K-S = .002). However, by clustering the sample by type of organisation it is seen that the variable 'contacts' is normally distributed within each group (values of .5295, .7307 and .9345 are obtained for municipalities, public and private sector organisations respectively).

Finally, a similar statistical analysis was also carried out for the Algarve tourism board (see tables 7.8 to 7.10). The results show that the organisations included in the Algarve region are more closely tied to each other than in the Rota da Luz and the Alto Minho, which is a situation that may be demonstrated by their indexes of connectivity. For instance, the index of connectedness among municipalities is 27%, which is higher than in the Alto Minho (26%) and the Rota da Luz (21%); in relation to private sector organisations this index is however similar to that observed in the Alto Minho (15%), but higher than the one observed in the Rota da Luz region (10%). The most important difference is nevertheless observed in terms of public sector organisations, whose index of connectivity reaches 29%, which is higher than those obtained in the Alto Minho (21%) and the Rota da Luz (22%).

A test was also computed with the objective of assessing whether the variable 'contacts' was normally distributed across the whole sample. Again, a Kolmogorov-Smirnov test shows that the variable is not normally distributed in the sample (K-S = .0017), though normality may be accepted by clustering the population by type of organisations (figures of .0533, .2643 and .6939 were obtained for municipalities, public and private sector organisations respectively).

After having discussed the situation within each board it is important to compute now a global measure capable of comparing the level of connectedness among the three boards, which may be done by using equations 5.2 and 5.3 (for an expanded analysis see section 6.8.2.2). The results provided by table 7.11 afford confirmation that the level of connectedness within the Algarve board (.45) is higher than in the Alto Minho (.43) and the Rota da Luz (.36), which proves the initial hypothesis raised only on the basis of the qualitative information supplied by figures (sociograms) 7.11, 7.12 and 7.13 when it was suggested that the member organisations of the Algarve board seemed to be more closely tied to each other than the members of the other two regions.

Finally, taking into account that the variable 'contacts' is not normally distributed in the three samples collected in the Alto Minho, the Rota da Luz and the Algarve boards, a test was computed to evaluate whether any similarity could be observed in the shape of the distribution of this variable in the three boards. For this purpose, a Kruskal-Wallis One Way Anova test was computed and values of .1329, .1752 and .1213 were obtained for the Alto Minho, the Rota da Luz and the Algarve respectively, which support the hypothesis that these three samples are extracted from populations with the same distribution.

The findings obtained in this section may be summed up as follows. To begin with, the web of relationships established by an organisation is a variable which is correlated with the type of organisation; that is, while public sector organisations and municipalities tend to establish more links to other organisations, private sector agencies tend to operate much more on an individual basis and, therefore, with fewer connections with other organisations; this is a situation which is observed independently of the region and of the stage of tourism development.

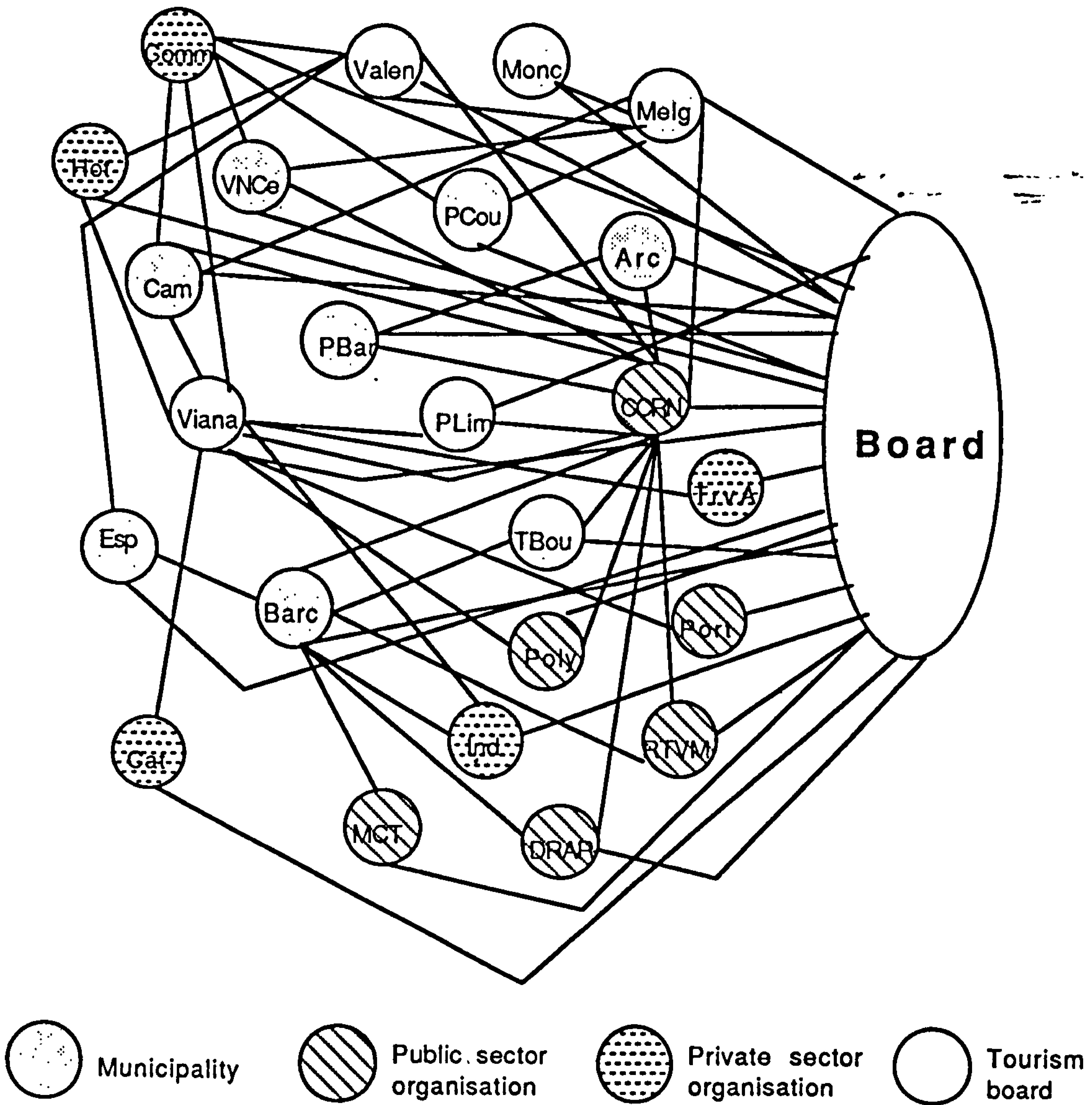
Secondly, the findings obtained from this section bring empirical evidence to some of the assumptions on which Miossec's model is based (Miossec, 1977). It is suggested in the model that the way in which organisations engage in the tourism sector depends on the level of tourism development within the region. The results discussed here show that there is indeed a correlation between level of tourism development and engagement of tourism and non-tourism organisations in the tourism sector (see table 7.11). In addition to this, sections 7.3.3 and 7.3.14 will also demonstrate that planning and environmental agencies tend to assume more importance in regions characterized by stronger levels of tourism development, which also offers empirical evidence to another assumption on which Miossec's model is underpinned.

Finally, it should be pointed out that despite the fact that the information debated in this section reports information gathered about the way in which organisations are linked to each other, the following sections will account on other areas such as the strength of the organisations, their level of influence, importance, coordination, basis and terms of the contacts. It will then be seen that the results obtained from this question are in accordance with the data collected in other parts of the interview-questionnaire (see the following sections).

7.3.2 Strength of the organisations

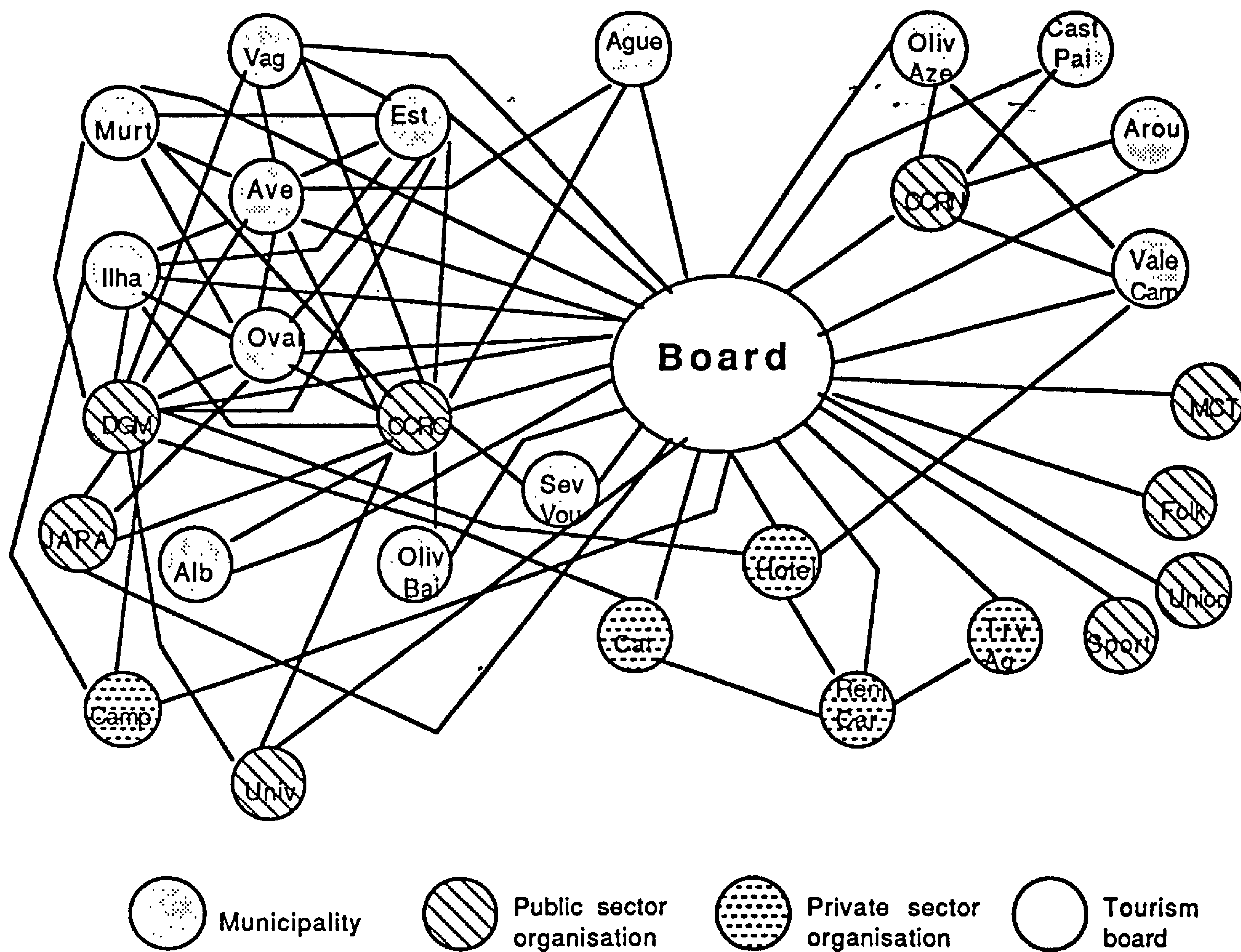
As discussed in section 6.8.2.2, the strength of a point in a graph may be defined as the number of connected components in a graph upon removal of the point. This analysis is

Figure 7.11 - Network of relationships established among the members of the Alto Minho tourism board (RTAM)



Source: Interview-questionnaire (see Appendix II)

Figure 7.12 - Network of relationships established among the members of the Rota da Luz tourism board (RTRL)



Source: Interview-questionnaire (see Appendix II)

Table 7.2 - Connectivity (Alto Minho tourism board - RTAM)

	Number of arches (n_j)	Index of Connectivity (IC)
1. Arcos Valdevez	3	.13
2. Barcelos	8	.33
3. Caminha	5	.21
4. Esposende	3	.13
5. Melgaço	7	.29
6. Monção	2	.08
7. Paredes de Coura	3	.13
8. Ponte da Barca	3	.13
9. Ponte de Lima	3	.13
10. Terras de Bouro	3	.13
11. Valença	6	.25
12. Viana do Castelo	11	.46
13. Vila Nova Cerveira	4	.17
14. Alto Minho Tourism Board (RTAM)	24	1.00
15. Northern regional planning commission (CCRN)	14	.58
16. Northern regional environmental commission (DRARN)	3	.13
17. Ministry of Commerce and Tourism (MCT).	2	.08
18. Verde Minho tourism board (RTVM)	3	.13
19. Hotels	3	.13
20. Catering	2	.08
21. Industry	3	.13
22. Chamber of commerce	6	.25
23. Port Authority	2	.08
24. Travel Agents	2	.08
25. Polytechnic	3	.13
TOTAL	128	

Source: Interview-questionnaire (see Appendix II)

Table 7.3 - Connectivity by clusters of organisations (Alto Minho tourism board - RTAM)

Cluster 1 $IC \leq 0.10^*$	Monção, Ministry of Commerce and Tourism (MCT), Catering, Port Authority, Travel Agents
Cluster 2 $0.10 \leq IC \leq 0.40^*$	Arcos Valdevez, Barcelos, Caminha, Esposende, Melgaço, Paredes Coura, Ponte Barca, Ponte Lima, Terras Bouro, Valença, VN Cerveira, Northern regional environmental commission (DRARN), Verde Minho tourism board (RTVM), Hotels, Industry, Chamber of commerce, Polytechnic
Cluster 3 $0.40 \leq IC \leq 0.60^*$	Viana Castelo, Northern regional planning commission (CCRN)
Cluster 4 $IC = 1.00^*$	Alto Minho Tourism Board (RTAM)

*IC = Index of Connectivity

Source: Interview-questionnaire (see Appendix II)

Table 7.4 - Connectedness by groups (Alto Minho Tourism Board - RTAM)

	Cases (N)	Group size (r)	Number of arches (n _t)	Group connectivity (GC)
Municipalities	1,2,3,4,5,6,7,8,9,10,11,12,13	13	61	.26
Alto Minho Tourism Board (RTAM)	14	1	24	1.00
Public sector organisations (exc/municipal.)	15,16,17,18,23,25	6	27	.21
Private sector organisations	19,20,21,22,24	5	16	.15
TOTAL	25	25	128	

Source: Interview-questionnaire (see Appendix II)

Table 7.5 - Connectivity (Rota da Luz tourism board - RTRL)

	Number of arches	Index of Connectivity (IC)
1. Agueda	3	.11
2. Albergaria a Velha	2	.07
3. Estarreja	8	.29
4. Ilhavo	7	.25
5. Oliveira de Azeméis	3	.11
6. Oliveira do Bairro	2	.07
7. Vale de Cambra	4	.14
8. Arouca	2	.07
9. Aveiro	9	.32
10. Ovar	8	.29
11. Castelo de Paiva	2	.07
12. Murtosa	6	.21
13. Sever do Vouga	2	.07
14. Vagos	5	.18
15. Rota da Luz tourism board (RTRL)	28	1.00
16. University of Aveiro	3	.11
17. Northern regional planning commission (CCRN)	5	.18
18. Central regional planning commission (CCRC)	13	.46
19. Port Authority (DGM)	12	.43
20. Aveiro Commercial Port (JAPA)	4	.14
21. Hotels	4	.14
22. Catering	3	.11
23. Travel Agents	2	.07
24. Rent a car	4	.14
25. Camping	3	.11
26. Folklore	1	.04
27. Workers Union	1	.04
28. Sports Institute	1	.04
29. Ministry of Commerce and Tourism (MCT)	1	.04
TOTAL	148	

Source: Interview-questionnaire (see Appendix II)

Table 7.6 - Connectivity by clusters of organisations (Rota da Luz tourism board - RTRL)

Cluster 1 $IC \leq 0.10^*$	Albergaria, Oliveira Bairro, Arouca, Castelo Paiva, Sever Vouga Travel Agents, Folklore, Union, Sport Institute, Ministry of Commerce and Tourism (MCT)
Cluster 2 $0.10 \leq IC \leq 0.40^*$	Agueda, Estarreja, Oliveira Azeméis, Vale Cambra, Aveiro, Ovar, Murtoza, Vagos University, Northern regional planning commission (CCRN), Aveiro Commercial Port (JAPA), Hotels, Catering, RentCar, Camping
Cluster 3 $0.40 \leq IC \leq 0.60^*$	Port Authority (DGM), Central regional planning commission (CCRC)
Cluster 4 $IC = 1.00^*$	Rota da Luz tourism board (RTRL)

*IC = Index of Connectivity

Source: Interview-questionnaire (see Appendix II)

Table 7.7 - Connectedness by groups (Rota da Luz tourism board - RTRL)

	Cases (N)	Group size (r)	Number of arches (n _t)	Group connectivity (GC)
Municipalities	1,2,3,4,5,6,7,8,9,10,11,12,13,14	14	63	.21
Rota da Luz tourism board (RTRL)	15	1	28	1.00
Public sector organisations (exc/municipal.)	16,17,18,19,20,28,29	7	39	.22
Private sector organisations	21,22,23,24,25,26,27	7	18	.10
TOTAL	29	29	148	

Source: Interview-questionnaire (see Appendix II)

Table 7.8 - Connectivity (Algarve tourism board - RTA)

	Number of arches	Index of Connectivity (IC)
1. Albufeira	5	.16
2. Alcoutim	3	.09
3. Aljezur	3	.09
4. Castro Marim	5	.16
5. Faro	18	.56
6. Lagoa	7	.22
7. Lagos	5	.16
8. Loulé	6	.19
9. Monchique	5	.16
10. Olhão	5	.16
11. Portimão	10	.31
12. S. B. Alportel	5	.16
13. Silves	5	.16
14. Tavira	5	.16
15. Vila do Bispo	4	.13
16. VR Santo António (VRSA)	14	.44
17. Algarve tourism board (RTA)	32	1.00
18. Ministry of Commerce and Tourism (MCT)	5	.16
19. Ministry of Health	3	.09
20. Ministry of Transport	2	.06
21. Algarve regional environmental commission (DRARN)	23	.72
22. Secretary of State for Culture (SEC)	5	.16
23. Algarve regional planning commission (CCRA)	22	.69
24. Airlines	1	.03
25. Polytechnic of Algarve	6	.19
26. DG Air	1	.03
27. Hotel	14	.44
28. Catering	3	.09
29. Travel Agents	6	.19
30. Rent a Car	3	.09
31. Workers Union of Hotel and Catering	5	.16
32. Workers Union Sea	1	.03
33. Workers Union of Tourist Guides	2	.06
TOTAL	239	

Source: Interview-questionnaire (see Appendix II)

Table 7.9 - Connectivity by clusters of organisations (Algarve tourism board - RTA)

Cluster 1 $IC \leq 0.10^*$	Alcoutim, Aljezur, Ministry of Health, Ministry of Transport, Airlines, DGAir, Catering, RentCar, Union Sea, Union Tourist Guides
Cluster 2 $0.10 \leq IC \leq 0.40^*$	Albufeira, Castro Marim, Lagoa, Lagos, Loulé, Monchique, Olhão, Portimão, SBAIportel, Silves, Tavira, Vila Bispo Ministry of Commerce and Tourism (MCT), Secretary of State for Culture (SEC), Polytechnic of the Algarve, Union Hotel and Catering (Union HC), Travel Agents
Cluster 3 $0.40 \leq IC \leq 0.60^*$	Faro, VRSAntónio (VRSA) Hotels
Cluster 4 $0.70 \leq IC \leq 0.80^*$	Algarve regional environmental commission (DRARN), Algarve regional planning commission (CCRA)
Cluster 5 $IC = 1.00^*$	Algarve tourism board (RTA)

IC = Index of Connectivity

Source: Interview-questionnaire (see Appendix II)

Table 7.10 - Connectedness by groups (Algarve tourism board - RTA)

	Cases (N)	Group size (r)	Number of arches (n _t)	Group connectivity (GC)
Municipalities	1,2,3,4,5,6,7,8,9, 10,11,12,13,14,15, 16	16	105	.27
Algarve tourism board (RTA)	17	1	32	1.00
Public sector organisations (exc/municipal.)	18,19,20,21,22,23, 24,25	8	67	.29
Private sector organisations	26,27,28,29,30,31, 32,33	8	35	.15
TOTAL	33	33	239	

Source: Interview-questionnaire (see Appendix II)

Table 7.11 - Indexes of connectedness in the Alto Minho, the Rota da Luz and the Algarve boards

	Alto Minho	Rota da Luz	Algarve
Index of connectedness	0.43	0.36	0.45
Actual connectedness	128	148	239
Maximum connectedness	300	406	528

Source: Interview-questionnaire (see Appendix II)

particularly important since the removal of some points in a graph may lead to its fragmentation. As also discussed before, a useful strategy to examine the strength of a point in a graph is by the simultaneous use of visual displays (sociograms) (figures 7.11, 7.12 and 7.13) and quantitative information (tables 7.2, 7.5 and 7.8), since while sociograms provide a visual approach to the problem, quantitative information helps to detect organisations with low levels of connectivity which, after being disconnected from the network, may lead to its fragmentation.

It should nevertheless be said that despite its importance, this approach shows some limitations for this thesis for the following reason: tourism boards are connected to all organisations by the regional tourism commissions; therefore, when disconnected from the network they might cause its fragmentation in situations in which organisations are linked to the regional tourism organisation only by the board. However, other organisations may never cause the fragmentation of the network due to the connections which are set up by all agencies to the tourism board. In short, as far as this thesis is concerned the study of the strength of an organisation in a network is equivalent to the evaluation of the strength of the tourism boards.

With respect to the Alto Minho board it may be observed that even when disconnecting the tourism board from the network all actors stay connected to each other (see figure 7.14), which means that its strength is zero. Alternatively, this situation may be examined by the analysis of the information provided by table 7.2: since all organisations are linked to the web by at least two arches, the probability of creating subgroups after disconnecting some nodes is lower.

Nevertheless, a different situation is observed in the Rota da Luz board, since there are four nodes which are linked to the network by only one arch (see table 7.5). Figure 7.13 also shows that these organisations are only connected to the network by the tourism board, which means

that after disconnecting it four actors lose their ties to the network (MCT, Folklore, Union and Sport) (see figure 7.5). That is, the strength of the tourism board is 4.

Although showing the highest level of connectedness (see table 7.11), a similar situation is also observed in the Algarve region. Table 7.8 illustrates that there are two organisations (DGAIR and Airlines) linked to the network by only one edge; figure 7.14 also shows that the board is their only link to the network, which means that after disconnecting the board (figure 7.16) these two nodes become disconnected from the web. That is, the strength of the Algarve tourism board in the Algarve regional tourism organisation is 2.

The study of the strength of a tourism board in a network helps to examine whether organisations are in practice linked together, in the sense that some sort of business or administrative relationships are established among them, or, alternatively, whether they result from a package of legislation which was passed by the government. The first situation (Alto Minho board) shows that there is in practice a network of relationships among the organisations which makes it 'alive' even in the absence of the tourism board. Conversely, the other two situations (Rota da Luz and Algarve boards) show that some organisations are associated with the network because a law was enacted with the objective of including them in the web.

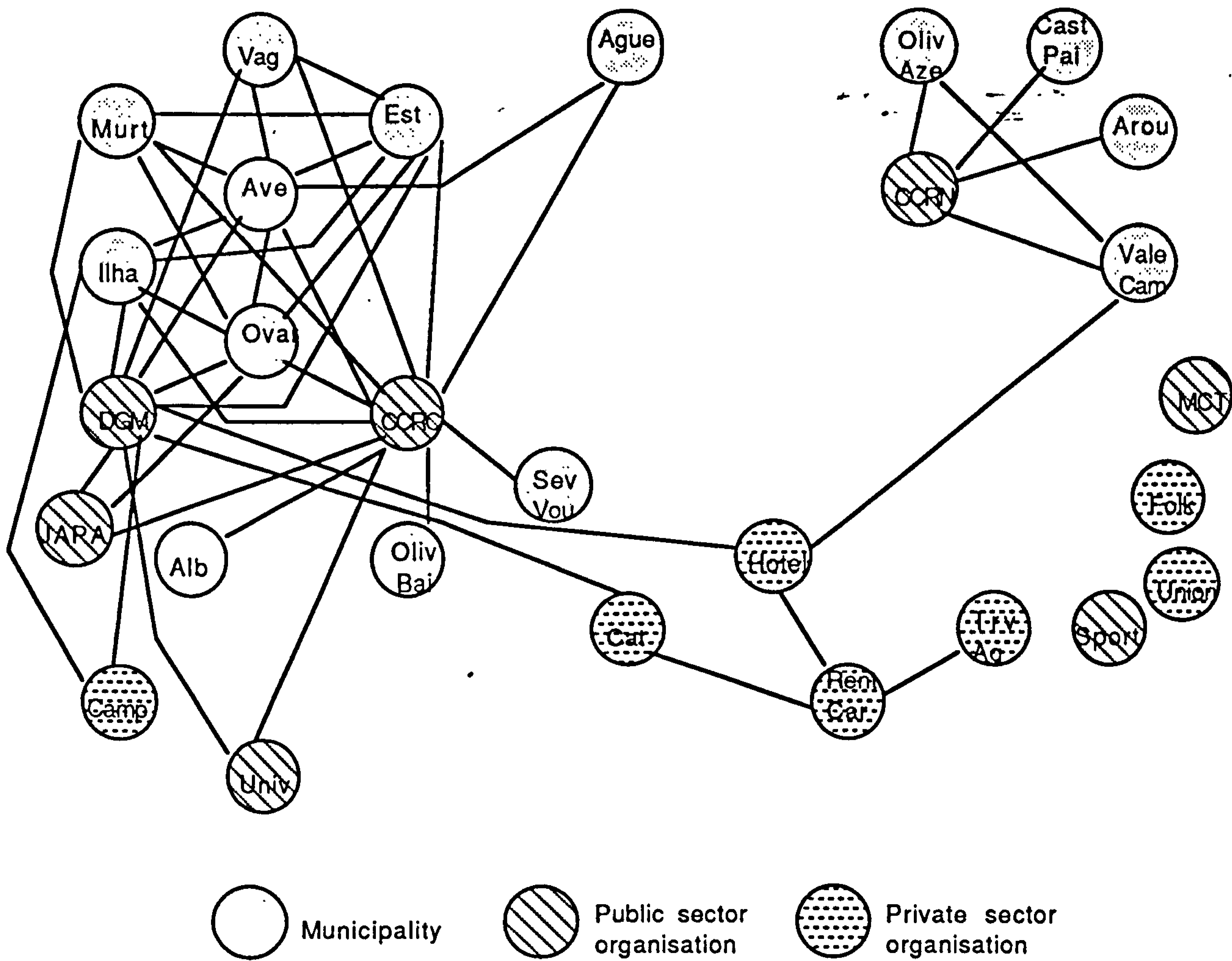
Taking the second situation into account it seems that there are some questions which should then be asked. The first question is why are some organisations part of a network when the other actors do not recognize importance of setting up contacts with them?; secondly, what are the criteria (if any) used to set up a tourism network?; finally, which strategies may be used in order to strengthen the relationships among the members of the regional tourism organisation?.

7.3.3 Levels of prominence

It was shown in section 6.8.2.2 that, by taking into account the number of links which organisations establish within a network, then they may be categorized as prominent or peripheral, visible or anonymous.

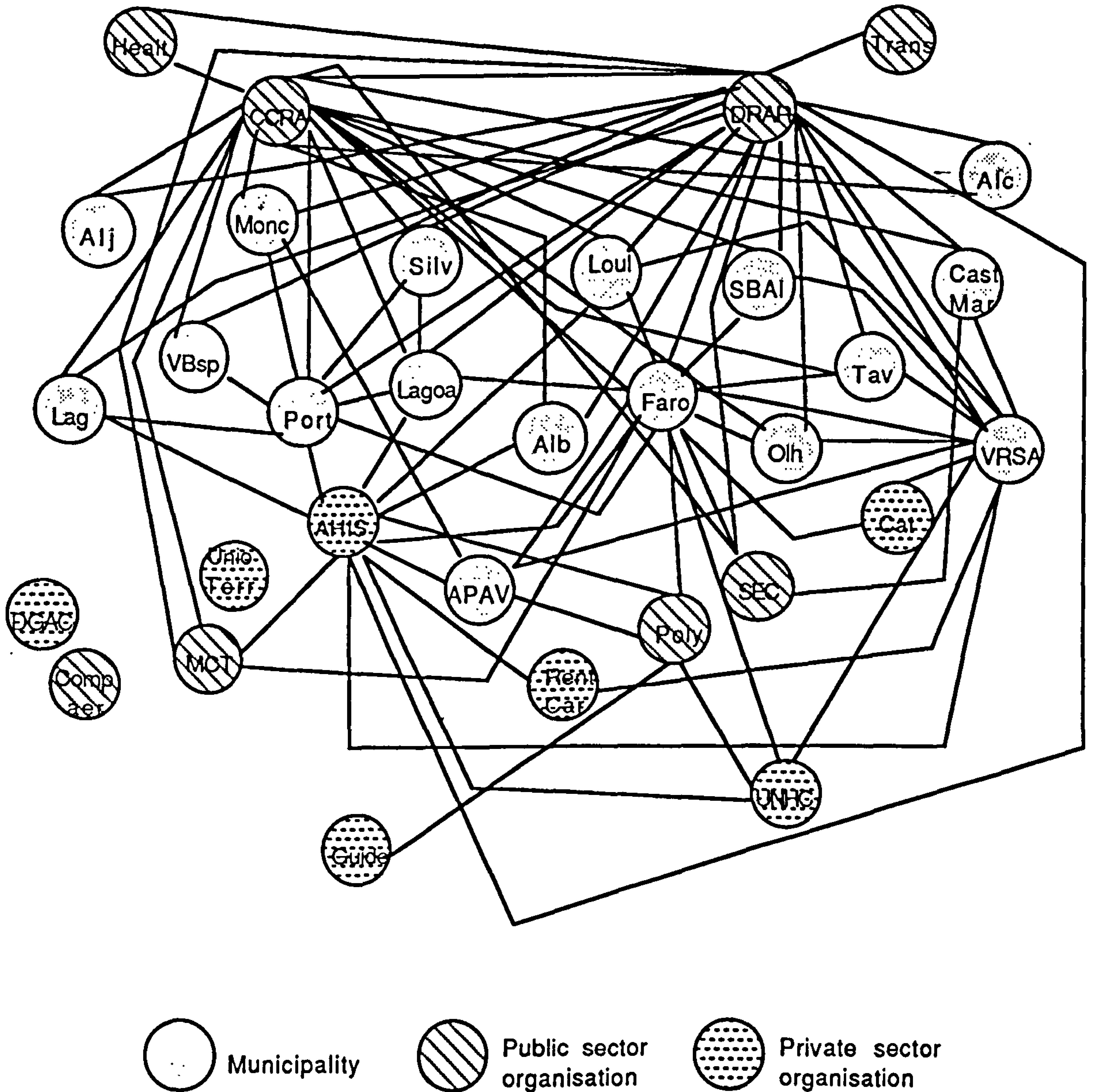
As far as the Alto Minho board is concerned it might be observed that whereas some organisations are connected to the network by many arches, others are instead linked by only some few (see figure 7.11). Table 7.12 also illustrates that a small share of 5 organisations (20% of the total) (RTAM, CCRN, Viana Castelo, Barcelos and Melgaço) account for 50% of the total connectivity, which makes them the core agencies of the Alto Minho tourism

Figure 7.15 - Network of relationships established among the members of the Rota da Luz tourism board (RTRL) in the absence of the board



Source: Interview-questionnaire (see Appendix II)

Figure 7.16 - Network of relationships established among the members of the Algarve tourism board (RTA) in the absence of the board



Source: Interview-questionnaire (see Appendix II)

administration. Furthermore, it is observed that 20 organisations (80% of the total) account for 92% of the total number of arches, which means that the remaining 5 agencies (20% of the total) (Monção, MCT, Catering, Port Authority and Travel Agents) account for only 8% of the total connectivity; that is, this last group of organisations constitute the periphery of the Alto Minho tourism administration.

With regard to the Rota da Luz board it is seen that a small group of 17% of prominent organisations (tourism board, CCRC, DG Marinha, Aveiro, Estarreja and Ovar) receive 52.7% of the contacts established within the board (see table 7.13). Furthermore the top 19 agencies (65.5% of the total) account for about 90% of the total connectivity, which means that a large group of 34.5% of peripheral organisations (Albergaria a Velha, Oliveira Bairro, Arouca, Castelo de Paiva, Sever Vouga, Travel Agents, Folklore, Union, Sport and MCT) account for a few 10% of the total connections set up among the members of the Rota da Luz regional tourism commission.

A similar situation may also be observed in the Algarve board, since a small group of 5 organisations (15% of the total) (RTA, DRARN, CCRA, Faro, VRS António and Hotels) account for 51.47% of the total connectivity, while 90% of the connectivity is concentrated in 22 organisations (66.7%) (see table 7.14). That is, there is a large group of 11 (33.3%) peripheral agencies which account for 10% of the total connectivity (Vila Bispo, Alcoutim, Aljezur, Health, Catering, Rent a Car, Transports, Union Guides, Airlines, DG Air, Union Sea).

These results show, first, that despite including a number of members the administration of tourism at regional level is dominated by a few organisations, such as tourism boards, regional planning agencies and the municipality where the board has its headquarters (20% of the total); generally speaking this cluster accounts for over 50% of the total connectivity. It is nevertheless argued in network literature that *most stable interorganisational networks contain a central core of organisations that dominate the flow of resources* (Knoke and Rogers, 1979, in Knoke, 1990, p. 109) and also that *these core actors display relatively dense mutual exchange ties, but they develop less frequent and more asymmetric ties to the peripheral organisations thus maintaining dominance over them* (Knoke, 1990, p. 109).

Secondly, and in accordance with the discussion introduced in section 7.3.1, it is also found that private sector organisations and most of the municipalities located in the interior areas assume a peripheral role within the administration of tourism, since they tend to account for less than 10% of the total connectivity.

Finally, the results discussed in this section also lead to the conclusion that the importance of planning and environmental agencies within the tourism organisation depends on the level of tourism development of the region; that is, planning and environmental organisations assume greater importance in areas characterised by higher levels of tourism development. These findings bring empirical evidence which supports some of the assumptions on which Miossec's model is based (for an expanded analysis see section 7.3.1).

Table 7.12 - Frequencies (Alto Minho)

Rank		Number of arches (n_i)	$f_i = \frac{n_i}{N}$	$F_i = \sum f_i$
1	14. Alto Minho tourism board (RTAM)	24	18.75	18.75
2	15. Northern regional planning commission (CCRN)	14	10.94	29.69
3	12. Viana do Castelo	11	8.59	38.28
4	2. Barcelos	8	6.25	44.53
5	5. Melgaço	7	5.47	50.00
6	11. Valença	6	4.69	54.69
6	22. Commerce chamber	6	4.69	59.38
8	3. Caminha	5	3.91	63.29
9	13. Vila Nova Cerveira	4	3.13	66.42
10	1. Arcos Valdevez	3	2.34	68.76
10	4. Esposende	3	2.34	71.10
10	7. Paredes de Coura	3	2.34	73.44
10	8. Ponte da Barca	3	2.34	75.78
10	9. Ponte de Lima	3	2.34	78.12
10	10. Terras de Bouro	3	2.34	80.46
10	16. Northern regional environmental commission (DRARN)	3	2.34	82.80
10	18. Verde Minho tourism board (RTVM)	3	2.34	85.14
10	19. Hotels	3	2.34	87.48
10	21. Industry	3	2.34	89.82
10	25. Polytechnic	3	2.34	92.16
21	6. Monção	2	1.56	93.72
21	17. Ministry of Commerce and Tourism (MCT)	2	1.56	95.28
21	20. Catering	2	1.56	96.84
21	23. Port Authority	2	1.56	98.40
21	24. Travel Agents	2	1.56	100.00
	TOTAL	128	100.00	

Source: Interview-questionnaire (see Appendix II)

Table 7.13 - Frequencies (Rota da Luz)

Rank		Number of arches (n _j)	$f_i = \frac{n_i}{N}$	$F_i = \sum f_i$
1	15. Rota da Luz tourism board (RTRL)	28	18.92	18.92
2	18. Central regional planning commission (CCRC)	13	8.78	27.70
3	19. Port Authority (DGM)	12	8.11	35.81
4	9. Aveiro	9	6.08	41.89
5	3. Estarreja	8	5.41	47.30
5	10. Ovar	8	5.41	52.71
7	4. Ilhavo	7	4.73	57.44
8	12. Murtosa	6	4.05	61.49
9	14. Vagos	5	3.38	64.87
9	17. Northern regional planning commission (CCRN)	5	3.38	68.25
11	7. Vale de Cambra	4	2.70	70.95
11	20. Aveiro Commercial Port (JAPA)	4	2.70	73.65
11	21. Hotels	4	2.70	76.35
11	24. Rent Car	4	2.70	79.05
15	1. Agueda	3	2.03	81.08
15	5. Oliveira Azeméis	3	2.03	83.11
15	16. University of Aveiro	3	2.03	85.14
15	22. Catering	3	2.03	87.17
15	25. Camping	3	2.03	89.20
20	2. Albergaria a Velha	2	1.35	90.55
20	6. Oliveira Bairro	2	1.35	91.90
20	8. Arouca	2	1.35	93.25
20	11. Castelo Paiva	2	1.35	94.60
20	13. Sever Vouga	2	1.35	95.95
20	23. Travel Agents	2	1.35	97.30
26	26. Folklore	1	0.68	97.98
26	27. Union	1	0.68	98.66
26	28. Sports Institute	1	0.68	99.34
26	29. Ministry of Commerce and Tourism (MCT)	1	0.68	100.00
	Total	148	100.00	

Source: Interview-questionnaire (see Appendix II)

Table 7.14 - Frequencies (Algarve)

Rank		Number of arches (n _j)	$f_i = \frac{n_j}{N}$	$F_i = \sum f_i$
1	17. Algarve tourism board (RTA)	32	13.39	13.39
2	21. Algarve regional environmental commission (DRARN)	23	9.62	23.01
3	23. Algarve regional planning commission (CCRA)	22	9.21	32.22
4	5. Faro	18	7.53	39.75
5	16. VRS António (VRSA)	14	5.86	45.61
5	27. Hotel	14	5.86	51.47
7	11. Portimão	10	4.18	55.65
8	6. Lagoa	7	2.93	58.58
9	8. Loulé	6	2.51	61.09
9	25. Polytechnic of the Algarve	6	2.51	63.60
9	29. Travel Agents	6	2.51	66.11
12	1. Albufeira	5	2.09	68.20
12	4. Castro Marim	5	2.09	70.29
12	7. Lagos	5	2.09	72.38
12	9. Monchique	5	2.09	74.47
12	10. Olhão	5	2.09	76.56
12	12. SB Alportel	5	2.09	78.65
12	13. Silves	5	2.09	80.74
12	14. Tavira	5	2.09	82.83
12	18. Ministry of Commerce and Tourism (MCT)	5	2.09	84.92
12	22. Secretary of State for Culture (SEC)	5	2.09	87.01
12	31. Union Hotel and Catering	5	2.09	89.10
23	15. Vila Bispo	4	1.67	90.77
24	2. Alcoutim	3	1.26	92.03
24	3. Aljezur	3	1.26	93.29
24	19. Ministry of Health	3	1.26	94.55
24	28. Catering	3	1.26	95.81
24	30. Rent Car	3	1.26	97.07
29	20. Ministry of Transports	2	0.84	97.91
29	33. Union Tourist Guides	2	0.84	98.75
31	24. Airlines	1	0.42	99.17
31	26. DG Air	1	0.42	99.59
31	32. Union Sea	1	0.42	100.00
	TOTAL	239	100.00	

Source: Interview-questionnaire (see Appendix II)

7.3.4 Cliques of organisations

As discussed in section 6.8.2.2, a clique can be defined as a subgroup of organisations which is more cohesive internally than the entire network. The study of cliques includes the evaluation of the following main areas: delimitation of their boundaries; reasons which prompt their creation; and whether they constitute the starting point for the fragmentation of a network.

The results prove that despite the fact that tourism boards are supposed to work as homogeneous organisations pursuing similar objectives, it is, nevertheless, found that some agencies tend to establish privileged relationships, and even formal commitments, with some particular members. There are two main reasons which explain why subgroups of organisations tend to emerge within the tourism boards: first of all, regional tourism commissions are viewed as too large and thus preclude through discussion and resolution of the tourism matters (for an expanded analysis see section 7.4.3); secondly, because tourism boards comprise a wide range of organisations whose goals and operating philosophies are often different, organisations tend to create closer connections with similar agencies (for an expanded analysis see section 7.3.11).

It is on account of these two main problems that cliques of organisations, and in particular cliques of municipalities, are mushrooming within the tourism boards. With this respect, several interviewees argued that because tourism boards are often blind to the distinct nature of the problems which are faced by different types of organisations, many local authorities have decided to look for alternative organisational frameworks capable of solving their problems. It was indeed observed that there are situations in which instead of using the tourism boards, local authorities implement joint tourism initiatives on the basis of other smaller administrative structures called 'Associations of Municipalities'.

According to Portuguese legislation (Decree-law 266/81) any two or more municipalities may establish an Association of Municipalities to solve common problems, in domains such as water supply, sewage treatment plants, waste disposal, accessibility, European projects, etc. However, what is also observed is the fact that several municipalities prefer to resolve some tourism issues within the Associations of Municipalities rather than within the tourism boards, principally in matters in which the boards have shown little capacity to deal with them (e.g., planning and development). For instance, although included in the Alto Minho board the members of the Association of Municipalities of the Minho Valley decided to set up a joint strategy which, among other concerns, includes several actions linked to the tourism sector (see Quatenaire, 1994, pp. 18-28).

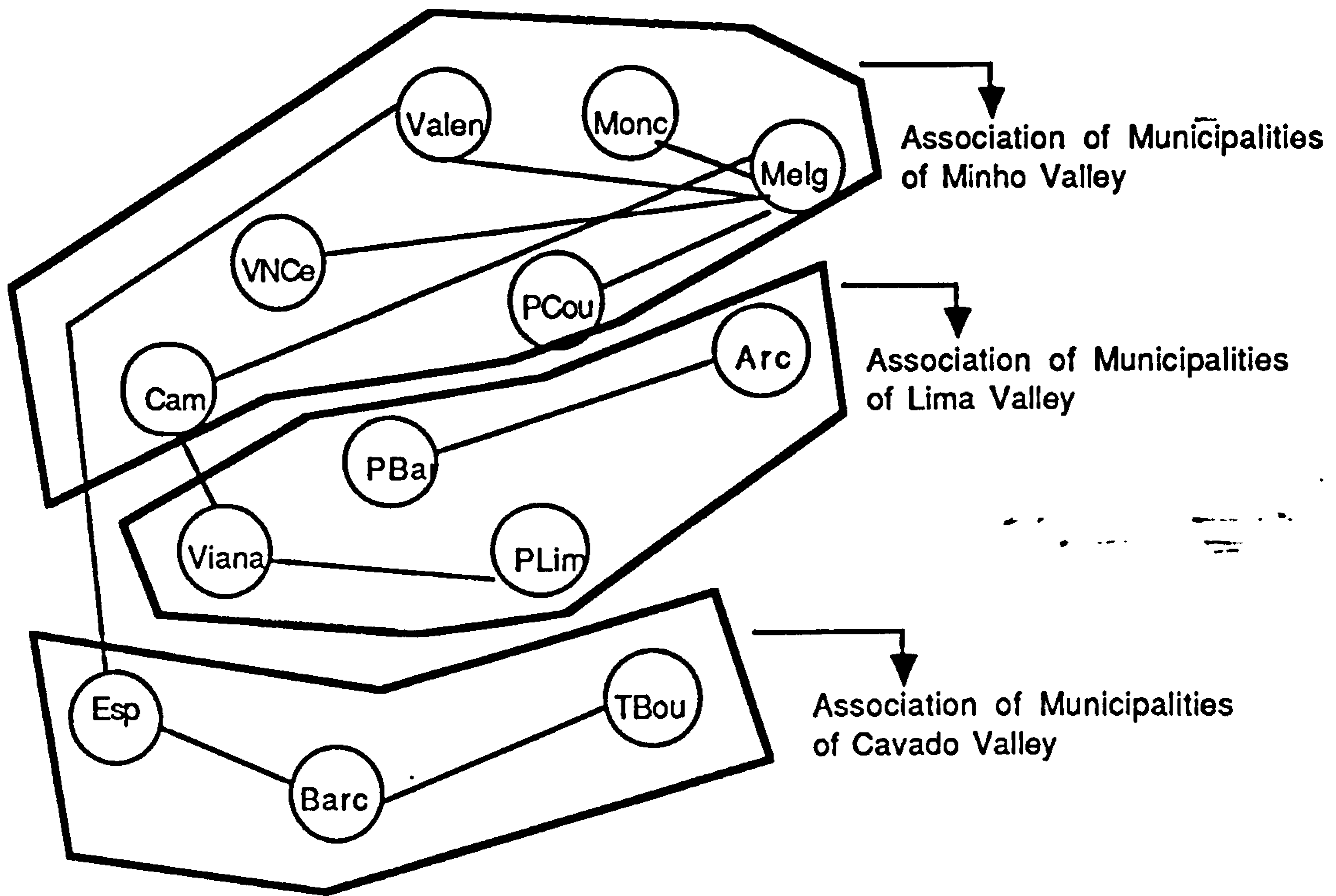
Figures 7.17 and 7.18 also demonstrate that the way in which municipalities tend to associate with each other is not random; that is, they set up privileged relationships with the neighbouring local authorities which are included in the same association of municipalities. Despite that, figure 7.19 also shows that the situation observed in the Algarve board is slightly different, since all the municipalities are linked to each other directly or indirectly, even if two main cliques of municipalities, one centered around Portimão and another comprising the municipalities located between Faro and Vila Real de Santo António (VRSA), may also be delimited in the Algarve board. That is, what is observed in the Algarve is a continuum networking which involves municipalities located in the eastern and western parts of the region (i.e., Vila Real de Santo António and Lagos); this may be explained as a result of the stronger cohesion observed in the Algarve region, which is due to its unique climate, history and socioeconomic structure. Accordingly, whereas it may be said that the boundaries of the Algarve region are the same as the Algarve tourism board, the same cannot be applied to the Alto Minho and the Rota da Luz regions.

To conclude, despite the fact that tourism boards are supposed to work as 'homogeneous' institutions which pursue similar objectives, cliques of organisations, and in particular cliques of municipalities, are emerging in several boards, because most of the policies implemented by the boards have failed to address the particularity of problems which affect different members. Besides, situations were even detected in which some tourism board presidents prefer to deny, or even hide, the multiplicity of interests represented in their regions, because they are afraid of losing control over their members and of causing the fragmentation of the network, when, paradoxically, it is that strategy which, among other issues, is causing its fragmentation. The need to recognize the diversity of situations and problems within the tourism organisation and bring them into cohesive policies is a matter which was discussed in chapters 2 and 3 and which must be carefully taken into account in the planning and organisation of the tourism sector.

7.3.5 Frequency of the contacts

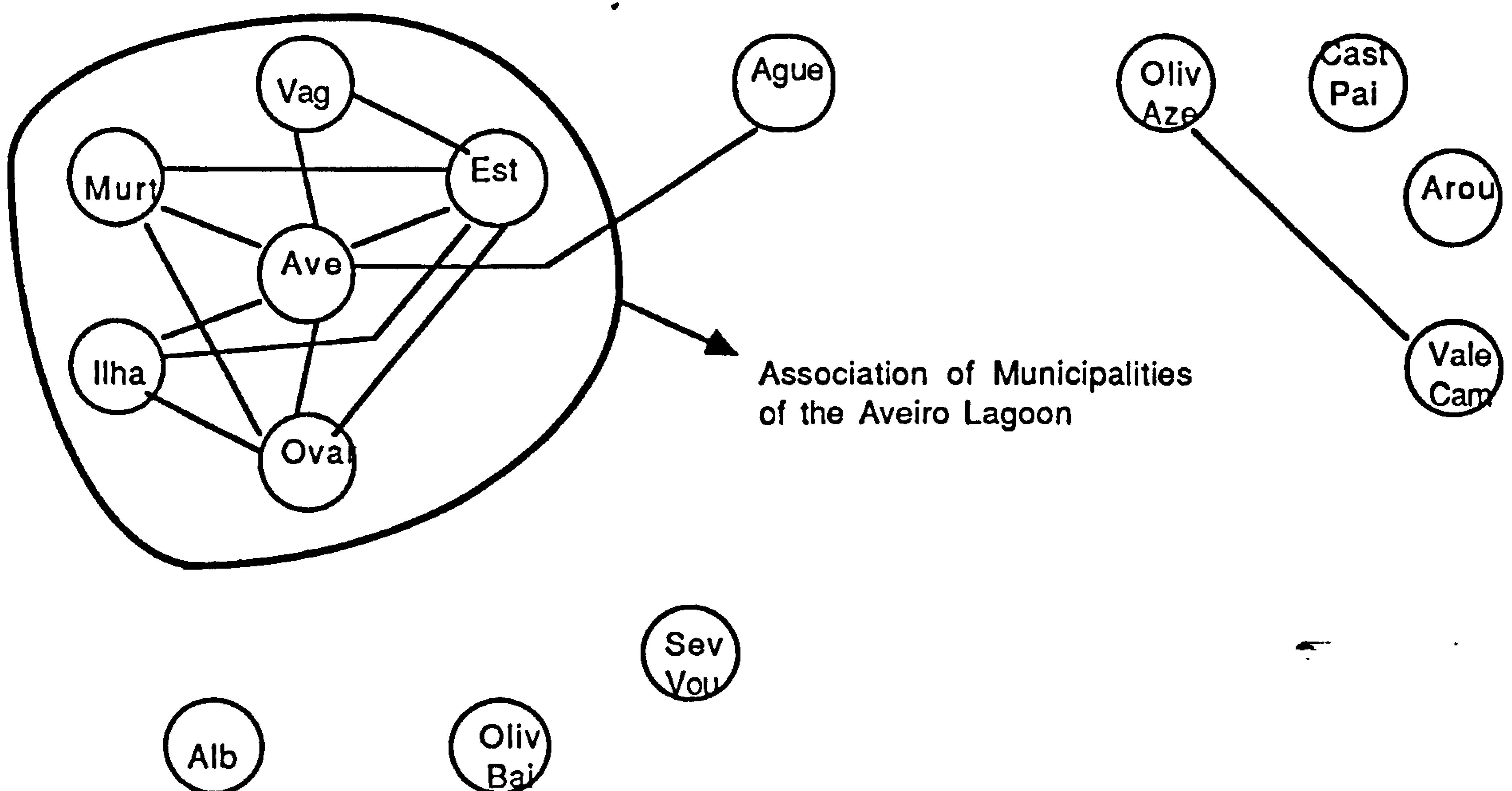
As discussed in section 7.3.1, most organisations involved in the regional tourism organisation establish few links to each other, and also most contacts are sporadic which makes them ineffective and inefficient. In order to assess whether this claim is valid the interviewees were asked about the frequency of their contacts with other organisations, according to the following five point scale: 1 = a few times a year; 2 = about once a month; 3 = about once a week; 4 = about once a day; 5 = almost permanently; 0 = no answer/don't know (see question 3, questionnaire (I) in Appendix II).

Figure 7.17 - Cliques of municipalities in the Alto Minho tourism board (RTAM)



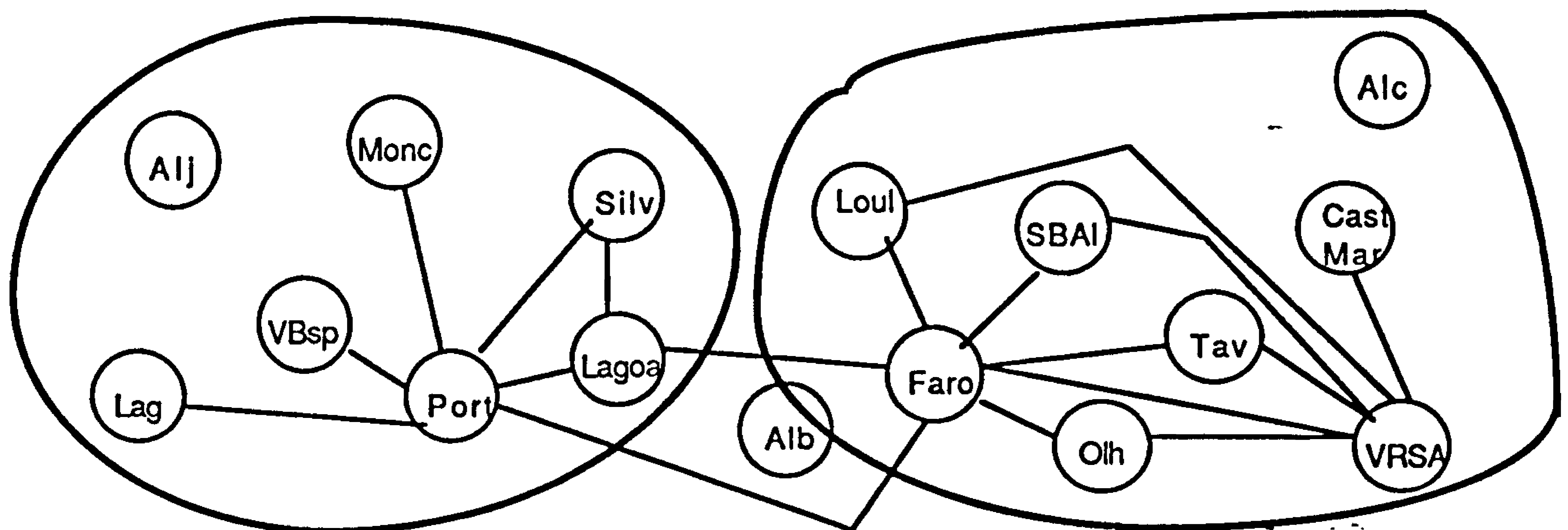
Source: Interview-questionnaire (see Appendix II)

Figure 7.18 - Cliques of municipalities in the Rota da Luz tourism board (RTRL)



Source: Interview-questionnaire (see Appendix II)

Figure 7.19 - Cliques of municipalities in the Algarve tourism board (RTA)



Source: Interview-questionnaire (see Appendix II)

The results show that the frequency of the contacts set up among the members of the Alto Minho regional commission varies between once a month and once a week ($\bar{Q}_3 = 2.34$); in the Algarve they tend to happen about once a month ($\bar{Q}_3 = 1.99$); while the members of the Rota da Luz board tend to contact each other between a few times a year and once a month ($\bar{Q}_3 = 1.59$). This means, again, that most organisations solve their (tourism) problems on an individual basis and thus do not take into account policies and strategies set up by other organisations (see also section 7.3.1). Among other things this also provides evidence for the poor horizontal coordination of tourism policies, which strongly conflicts with the new planning and organisational trends discussed in chapters 1 to 4 (for an expanded analysis see also section 7.3.12).

The statistical analysis also shows that infrequent contacts is an issue which affects all members of the regional commissions independently of their type (a K-S test was computed and values of respectively .3508, .3916 and .3457 were obtained for the Alto Minho, the Rota da Luz and the Algarve boards respectively, which illustrate that the variable is normally distributed by type of organisation). Despite that, it is also found that the local authorities are among the most frequently contacted organisations (2.36, 1.63 and 2.26 in the Alto Minho, the Rota da Luz and the Algarve respectively), closely followed by the public sector organisations (2.39, 1.54 and 1.79 in the Alto Minho, the Rota da Luz and the Algarve respectively); conversely, private sector organisations are the less frequently contacted agencies within the tourism network (2.27, 1.51 and 1.55 in the Alto Minho, the Rota da Luz and the Algarve respectively).

The (main) reason which explains why municipalities are the most frequently contacted group of organisations is linked to the fact that they are at the core of the decision-making and -taking process at regional/local level in matters such as planning, development, licensing, etc. In addition to that, most decisions taken at local level have to involve a number of other official agencies, the reason why the local authorities are in the core of a dense web of relationships and are the most important and prominent organisations in the regional tourism organisation (for an expanded analysis see sections 7.3.1, 7.3.3 and 7.3.14). For instance, decisions related to planning matters must be endorsed by the regional planning commissions (CCRs); matters linked to the environment and to the planning and management of the coastline are under the responsibility of the regional environmental commissions (DRARNs); problems linked to the planning and management of ports are under the responsibility of the port authorities; etc.

Likewise, there are several public sector organisations which are also at the core of a dense web of relationships. In particular the regional planning agencies (CCRs), the regional environmental commissions (DRARNs) and the port authorities assume an important role within the public sector organisation, due to their responsibilities in matters such as urban and regional planning, environmental planning, and administration of harbouring areas respectively. Hence, these organisations are also ranked amongst the most prominent agencies of the regional tourism organisation (see section 7.3.3), the reason why they are also frequently contacted by other groups.

7.3.6 Reason for the contacts

In order to examine the reason why organisations contact each other, a range of 5 options was given to the interviewees, according to the following scale: 1 = to request information/data; 2 = to give information/data; 3 = to coordinate actions/policies; 4 = other; 0 = no answer/don't know (see question 4, questionnaire I, Appendix II). While options 1 and 2 refer to situations in which only information is exchanged between different organisations, option 3 includes situations in which there are either short-term and ad-hoc efforts made by pairs of organisations to exchange and coordinate their activities, or even formally structured arrangements for coordination (for an expanded analysis see Van de Ven and Walker, 1984). It should be noted that in particular options 1 and 2 help to detect embryonic stages in the development of interorganisational relationships, labelled by Warren et al (1974) as 'mobilization coordination'.

The results show that, despite some regional variations, over 70% of the contacts set up among the members of the regional tourism commissions are established with the objective of coordinating actions and policies (option 3) (84% in the Algarve; and 69% in the Alto Minho

and in the Rota da Luz boards). In addition to that, it is also found that the percentage of contacts aimed at coordinating actions and policies is particularly high among municipalities (respectively, 100%, 76%, and 73% in Algarve, Rota da Luz and Alto Minho), which may be explained as a result of the reasons discussed in the previous section (section 7.3.5). That is, because many decisions taken by the local authorities have to be endorsed by other organisations, such as CCRs, DRARNs, port authorities, etc, so their work has to be closely coordinated with other governmental institutions.

The second largest group of answers falls into options 1 and 2: a share of 25% of interviewees stated that their contacts with other organisations are made with the objective of exchanging information. This means that by summing up options 1, 2 and 3, 95% of the contacts seek, directly or indirectly, to coordinate policies and strategies.

This finding is particularly important if some of the results introduced in sections 7.3.1 and 7.3.5 are also taken into account, since it was then discussed that most contacts are sporadic and infrequent. However, what is found now is the fact that the vast majority of these few contacts pursue the coordination of policies and strategies, which seems to suggest that if they are expanded in the future it is likely that a closer inter-organisational coordination of policies and strategies may be achieved.

Finally, particular attention should be drawn to two other findings. First of all, it is seen that many contacts directed to public sector organisations (e.g., planning and environmental commissions) are made only with the objective of requesting information (44%, 31% and 16% in the Rota da Luz, the Alto Minho and the Algarve respectively). Nevertheless, what will be seen further is the fact that these contacts are formal since they are often undermined by a climate of tension and conflict with these powerful government agencies (see sections 7.3.7 and 7.3.13).

Secondly, there is a relationship between information provided by private sector agencies and stage of tourism development. That is, it is observed that the interest in information produced by private sector agencies is particularly more intense in areas characterized by higher levels of tourism development. For instance, whereas 36% of the contacts directed to the Algarve private sector organisations are made with the intention of asking information about their operations, only 1% of the private sector agencies located in the Alto Minho and the Rota da Luz boards receive similar demands.

7.3.7 Basis of the contacts

Another matter which helps to examine the characteristics of the relationships set up among organisations is the basis on which contacts are made. Bearing this in mind the interviewees were asked to assess this issue according to the following five point scale: 1 = required by law; 2 = formal agreement between organisations; 3 = common practice / handling specific problems or needs; 4 = other (specify); 0 = no answer/don't know (see question 5, questionnaire (I) in Appendix II).

The findings brought about by this question show several similarities with the results which were introduced in the previous section (see section 7.3.6). That is, it is again observed that over 80% of the contacts established within the three tourism boards are based on common practice, which illustrates, once again, that although based on low levels of connectivity (see section 7.3.1 and 7.3.5) there is an informal network of relationships, involving several organisations, based on the exchange of information and, to a certain extent, on the coordination of policies (see section 7.3.12). In accordance with other findings introduced previously, it is seen that the vast majority of the contacts directed to municipalities are made on a common practice basis for the reasons discussed before (100%, 95% and 88% in the Algarve, the Alto Minho and the Rota da Luz respectively) (see section 7.3.5). However, a different scenario is found when the discussion moves to other public sector organisations.

For instance, 33.3%, 26.7% and 23.1% of the contacts directed to the Alto Minho, Algarve and Rota da Luz boards respectively, are made since they are 'required by law' (option 1); that is many organisations contact the boards because, being members of the regional tourism commissions, they have to attend (formal) meetings. It was argued by several interviewees that instead of creating an informal web of relationships most boards only contact their members for and during formal meetings, which enables them to run the regional tourism administration without external 'interferences'. Such a situation is viewed as responsible for the lack of participation, democracy and accountability on which tourism policies are based, as well as for the present state of frustration and disenchantment with the way in which the regional tourism organisation is operated in Portugal (see also section 7.4.2).

The criticism that a good share of the contacts established with some agencies are formal instead of informal is not exclusive to the tourism boards but is also extended to other public sector organisations, such as the planning and environmental commissions. Indeed, the results also lead to the conclusion that as far as the Algarve region is concerned, 50% and 42.9% of the contacts directed to the regional environmental commission (DRARN) and to the regional planning commission (CCRA) respectively, follow formal procedures; that is, they take place

because the legislation has made the contact with these organisations compulsory in matters such as urban, regional and environmental planning; licensing of infrastructure and equipment; etc. Similarly, 50% of the contacts set up with the central and northern regional planning commissions (CCRC and CCRN), which are members of the Rota da Luz and the Alto Minho boards, were mentioned as following the same type of reasoning. The main cause for this situation seems to be linked to the fact that these organisations are viewed by many local agencies as representing national rather than local interests; hence, situations of tension and conflict between them are said to be frequent.

Although situations of conflict and competition involving national, regional and local organisations are not exclusive to Portugal but may, instead, be observed all around the world, it is nevertheless known that such problems often contribute to the undermining of the decision-making and -taking process. Among other strategies, it seems sensible that a direct involvement of all agencies in the preparation and implementation of policies may help to pull all organisations together, to prevent what often are only misunderstandings, as well as to lead to more participatory, accountable and informed strategies.

7.3.8 Terms of the contacts

After having examined the reasons which lead organisations to communicate with each other it is important to analyse now how the terms of such contacts take place. Bearing this in mind the interviewees were asked to answer a question which helps to discuss whether contacts set up with other organisations are initiated by them, by other organisations or whether they emerge on a mutual basis, according to the following 5 points scale: 5 = completely by them; 4 = mostly by them; 3 = mutually; 2 = mostly by us; 1 = completely by us; 0 = no answer/don't know (see question 6, questionnaire I, Appendix II).

The results show that most of the communication which is established among the members of the Algarve, the Alto Minho and the Rota da Luz regional tourism commissions is set up on a mutual basis (an average value of about 3 was obtained in the three tourism boards), which again brings evidence for the findings introduced in sections 7.3.6 and 7.3.7. That is, most contacts are established on a mutual basis, since they rely on common practice and are arranged according to particular needs or problems.

The statistical analysis also leads to the conclusion that this variable is normally distributed across the three tourism boards (values of .0782, .7862 and .1866 were obtained for the Alto Minho, the Rota da Luz and the Algarve regions respectively, by the use of a K-S test), which

means that mutual communication is a reality which, generally speaking, is independent of the type of organisation. Despite that there are some exceptions for which an explanation must be given.

For instance, the results also show that, unlike the general trend, most contacts involving the representatives of national institutions are initiated by them. This situation is particularly clear in the Algarve region since 100%, 100%, 75%, 50%, 42.9% and 33.35% of the contacts linking the representatives of the Ministry of Health, Ministry of Transports, Secretary of State for Culture, Ministry of Commerce and Tourism, regional environmental commission (DRARN), and regional planning commission (CCRA) respectively to other organisations, have origin in these institutions. This finding draws attention to the following three main issues.

To start with, there is a greater involvement of official institutions in the Algarve tourism organisation; that is, although not represented in other boards, the Algarve administration includes several governmental institutions, such as the Ministry of Health, Secretary of State for Culture, Ministry of Transports, and Portuguese airlines (TAP Air Portugal); this situation may be explained as a result of the great importance of the Algarve tourism to the national and regional economies (for an expanded analysis see 5.3.2.3).

Secondly, because this (excessive?) involvement of national institutions in the Algarve region is viewed by most local organisations in contradiction with the tourism administration established in other parts of Portugal, and also in disagreement with the legislation which was passed by the government which suggests that tourism at regional level is to be run by regional and local level organisations (DL 287/91; DL 327/82), then the communication with these agencies is embodied in an atmosphere of tension and conflict; therefore, and as viewed above, most of the contacts involving these organisations are initiated by them.

Finally, because the vast majority of the representatives of national institutions live outside the Algarve region, they show little interest, knowledge and motivation for the local problems. Hence, their involvement in the regional tourism organisation is restricted to the attendance of (formal) meetings and voting for policies which are set up within their ministries.

These problems, which are observed in the Algarve tourism administration, seem to suggest that some misunderstandings may emerge in the way in which some tourism literature may be interpreted, when it is stated that governments should develop an active role in the tourism development process (see Inskip, 1994, 1991; WTO, 1985a, 1983a). That is, viewed from the point of view of the national government such an argument may stimulate forms of direct involvement in the regional administration, which may end up in conflicts similar to those seen

in the Algarve board. Conversely, what the evidence brought about by this thesis suggests is that, although supported by national policies (e.g., planning, marketing, financing, regulation, etc), tourism at regional level should be left in the hands of local and regional operators. This finding is also supported by the discussion presented previously about the way in which efficient and effective forms of planning and organisation should be set up in the future (for an expanded analysis see chapters 2 and 3).

7.3.9 Influence of the contacts

Another matter which ought to be discussed in sociometric analyses is whether communication influences the way in which organisations are run. With regard to this, the interviewees were asked if the contacts which they set up with other organisations have any influence on decisions taken within their own agencies, according to the following five point scale: 5 = a great deal of influence; 4 = quite influential; 3 = some influence; 2 = little influence; 1 = no influence at all; 0 = no answer/don't know (see question 7, questionnaire I, Appendix II).

The results show that despite the fact that this variable is normally distributed within the three samples, which means that the influence of contacts is independent of the type of organisations (values of .1292, .1792 and .6160 were computed by the use of a K-S test for the Alto Minho, the Rota da Luz and the Algarve tourism boards respectively), there are several variations by region and by type of organisations which should be discussed here.

To begin with, it is found that most of the contacts which are established among the members of the Alto Minho board are viewed as quite influential on decisions taken by the tourism participants of this region (3.76), while in the Algarve they are perceived only with some influence (2.96); as far as the Rota da Luz board is concerned they are seen as being between some and quite influence (3.27).

Furthermore, it is also found, in accordance with results discussed in other parts of this chapter (see, for instance, sections 7.3.1, 7.3.3, 7.3.5, 7.3.7), that public sector institutions are amongst the agencies which develop more influence on decisions taken by other organisations, due to their power in matters such as planning, development, licensing, financing, etc (3.97, 3.61, and 3.19 in the Alto Minho, the Rota da Luz and the Algarve respectively); the findings also show that, owing to their responsibilities at local level, local authorities are viewed as the second group of organisations with more influence on decisions which are taken by other organisations (3.84, 3.35, and 2.79 in the Alto Minho, the Rota da Luz and the Algarve boards respectively). Not surprisingly, private sector organisations are ranked behind public sector

organisations and municipalities, since they do not have any power to enact laws and regulations.

Another important finding which emerges from this question is related to the influence developed by the boards on (tourism) decisions taken by other organisations. Despite the strong criticism which is raised by most organisations about the way in which tourism boards operate in Portugal (for an expanded analysis see section 7.4.3 and 7.3.7), 69.3% and 66.7% of the members of the Rota da Luz and the Algarve boards respectively consider that they are quite influential or have even a great deal of influence on decisions they have to take. The percentage of interviewees with the same opinion in the Alto Minho board is however smaller (50%), which is explained by the respondents by the fact that the same directors have been in power for a long time; this is viewed as having negative repercussions on the quality, efficiency and effectiveness of the policies set up by the board, the reason why they argue that legislation should be passed limiting the number of mandates of the tourism board presidents, as happens in other areas.

7.3.10 Importance of the contacts

Another variable which helps to examine the characteristics of the communication established within a network of organisations is related to the importance given to contacts which are set up with other agencies. Bearing that in mind, the interviewees were asked to examine this matter according to the following scale: 5 = very important; 4 = quite important; 3 = moderately important; 2 = little important; 1 = not important at all; 0 = no answer/don't know (see question 8, questionnaire I, Appendix II).

The most important finding which is obtained from this question is related to the fact that, despite being critical about the efficiency and effectiveness of the Portuguese regional tourism organisation and about the poor quality of the relationships set up among the members of the regional tourism organisation, for the reasons discussed in other parts of this chapter, the vast majority of the interviewees mark their contacts with other organisations as being between quite important and very important (4.41, 4.04 and 4.35 in the Alto Minho, the Rota da Luz and the Algarve regions respectively). That is, it is passionately believed among tourism participants that organisational structures which facilitate the exchange of information, ideas, data, technical expertise, etc, bring important individual benefits for all. The consensus found in this matter is so widespread that the variable is normally distributed across the three samples, and, therefore, the results are independent of the type of organisation (figures of .5273, .2157 and .1970 were computed for the Alto Minho, the Rota da Luz and the Algarve by the use of a K-S test).

Nevertheless, and similarly to other results, some small variations by type of organisation may also be observed. For instance, because municipalities and public sector organisations are ranked among the most prominent and influential organisations within the tourism administration (see sections 7.3.3 and 7.3.9), they are also evaluated among those institutions which are most rewarding to contact (values of 4.59, 4.23, 4.65 and 4.45, 4.29, 4.07 were obtained for municipalities and public sector organisations in the Alto Minho, the Rota da Luz and the Algarve regions respectively); as far as private sector associations are concerned they are assessed below both public sector agencies and municipalities (4.07, 3.44 and 3.91 in the Alto Minho, the Rota da Luz and the Algarve boards respectively), which may be explained on account of their lower levels of prominence (see section 7.3.3), less influence on other organisations (see section 7.3.9), small size (see sections 7.2.3 and 7.2.4), and the ambiguous way in which their representatives are appointed to the regional commissions (see section 7.2.2).

7.3.11 Compatibility of goals and operating philosophies

It is sensible to suggest that the way in which organisations connect with each other depends, among other things, on the similarity of their goals and operating philosophies. Bearing that in mind, the members of the regional tourism organisation were asked whether, and to what extent, the goals and operating philosophies of the agencies they contact are similar to the goals and operating philosophies of their own organisations, according to the following five point scale: 5 = very compatible; 4 = quite compatible; 3 = moderately compatible; 2 = little compatible; 1 = not compatible at all; 0 = no answer/don't know (see question 10, questionnaire I, Appendix II).

The results show that despite the fact that tourism boards are often viewed as 'homogeneous' organisations, because they are supposed to represent distinct tourism products, the agencies which are represented in the regional tourism commissions are different from each other in terms of their goals and operating philosophies. Indeed, a K-S was computed and values of .0190, .0205, .0104 were obtained for the Alto Minho, the Rota da Luz and the Algarve regions respectively, which shows that this variable is not distributed normally across the three samples; however, after clustering the samples by type of organisation it is found that normality may then be accepted.

A qualitative analysis of the results also affords the conclusion that the operating philosophy and working styles of both municipalities and what are labelled here as public sector

organisations are similar to each other because both are run under public sector philosophy. As far as private sector organisations are concerned, their operating philosophy is guided by a market-led approach since they are profit oriented.

In spite of the fact that this finding may be viewed as commonsense it is, nevertheless, found that it helps to draw attention to some misunderstandings which undermine the functioning of the Portuguese tourism boards. Indeed, a major problem which affects most regions is linked to the fact that tourism commissions were established to operate as a whole, which means that the particularity of situations in terms of both objectives and operating styles, discussed in this section, and spatial differentiation of problems, discussed in section 7.3.4, are not considered seriously. Hence, most boards become ineffective and inefficient at resolving several problems, which, as documented in several parts of this chapter, often leads to states of disenchantment, frustration or even fragmentation of the administration (see also section 7.3.4).

This approach conflicts strongly with the discussion introduced in chapters 1 to 4 where it was seen that the present trend towards efficient and effective forms of planning and organisation include styles which, though comprehensive, do not deny the peculiarity of situations and interests involved in the decision-making and -taking process. To put it in a different way, only by taking into account the diversity of situations and interests may planning be based on informed, accountable and implementable solutions.

7.3.12 Levels of coordination

Another important matter often discussed in sociometric studies is related to the extent to which organisations coordinate their strategies with policies set up by other agencies. As argued before in the literature review chapters (sections 1 to 4), this issue is assuming growing importance in the planning, management and administration of systems, because, as the world is getting globalized, most institutions and companies have realized that they no longer rely exclusively on individual actions. On the contrary, there is an increasing awareness that medium and long term sustaining growth involves notions not too often taken into account by many organisations, such as optimization of multiplier effects, carrying capacity, protection and enhancement of the surrounding social and natural environments, inter-organisational cooperation, etc.

Bearing that in mind, the interviewees were asked to examine whether, and to what extent, policies established by their organisations are coordinated with strategies set up by other tourism participants, according to the following five point scale: 5 = very well coordinated; 4 =

well coordinated; 3 = moderately coordinated; 2 = poorly coordinated; 1 = not coordinated at all; 0 = no answer/don't know (see question 11, questionnaire I, Appendix II).

The results obtained from this question demonstrate that there is poor coordination of policies among the members of the regional tourism organisation (3.41, 3.05 and 2.97 in the Alto Minho, the Rota da Luz and the Algarve regions respectively), which is a problem that affects all organisations independently of their type (a K-S was computed and values of .1954, .1503 and .3070 were obtained for the Alto Minho, the Rota da Luz and the Algarve boards, which shows that the variable is normally distributed by type of organisation). However, this finding may not be surprising if some previous findings, which may be used here as indirect indicators, are also brought into this discussion. That is, when looking at the low connectivity levels of the three boards (section 7.3.1), and the low frequency and influence of contacts (sections 7.3.5 and 7.3.9), then low levels of inter-organisational coordination is an outcome which should also be expected.

The results obtained from this question also draw attention to the poor practical capacity of tourism boards to assume a leading role within the regional tourism administration. For instance, and as far as the Rota da Luz board is concerned, 53.8% of the interviewees stated that (tourism) policies set up within their organisations are poorly (option 2) or even not coordinated at all (option 1) with strategies established by the board. Furthermore, though a slice of 46.2% of the members of the panel argued that some coordination with the board has been achieved (option 3), only a few 23.1% said that their policies are well coordinated (option 4) with the board; besides not a single member revealed that the activities developed within their organisations are very well coordinated with the board.

The situation found in the other two boards is slightly better; however, poor coordination of policies is again an issue. For instance, 33.3% of the interviewees in the Alto Minho region revealed that their policies are poorly or even not coordinated at all with the board. Furthermore, among those who said that some coordination has been achieved (66.7%), only 41.7% stated that their policies are well or very well coordinated with the board.

Likewise, 26.7% of the members of the Algarve board answered that their policies are poorly or even not coordinated at all with the board; among those 73.3% who said that some coordination has been achieved, only a few 26.7% confirmed that their policies are well coordinated with the official regional tourism policies.

The poor capacity demonstrated by tourism boards in assuming a leading role within the regional tourism organisation may be explained, among other things, by their lack of economic

and human resources (see sections 7.2.1, 7.2.3 and 7.2.4), small size (section 7.2.1), and incapacity to bring together the amalgamation of interests involved in the regional tourism organisation (section 7.3.4, 7.3.8).

7.3.13 Levels and nature of conflict

The study of the causes and intensity of conflicts is another important variable which helps to detect, among other things, the existence, or absence, of obstacles preventing (closer) relationships among organisations; power games undermining the functioning of networks; and the reason why agencies tend to set up privileged connections with some particular members of the boards.

Bearing this in mind the interviewees were asked to examine this matter according to the following ten main options: 1 = no disagreements at all; 2 = different viewpoints when handling specific matters; 3 = different operating philosophies; 5 = overlapping or duplication of services; 6 = inefficiency; 7 = differences in power; 8 = political problems; 9 = other (specify); 0 = no answer/don't know (see question 9, questionnaire I, Appendix II).

The results show that a large percentage of the interviewees preferred to answer this question by denying the existence of any sort of conflict with other organisations (option 1), for the reasons introduced previously; that is, because many of them do not feel comfortable, or are even afraid of commenting on this issue, then to state that there are no conflicts whatsoever with other organisations may be viewed as a polite way of not answering the question (for an expanded analysis see section 6.5). Nevertheless, among those who decided to speak out about this matter some suggested that there are indeed few conflicts among the members of the regional tourism organisation, because they are poorly and infrequently connected to each other (see sections 7.3.1 and 7.3.5), and most problems are sorted out individually within each organisation (see section 7.3.12); hence, there are few opportunities for conflicts to emerge.

The second largest slice of answers fell into option 2; that is several interviewees suggested that sometimes conflicts with other organisations do emerge as a result of disagreements involving the way in which some problems are dealt with. The example of plans and projects comprehending two or more municipalities (inter-municipal projects) was cited as a frequent source of conflict involving local authorities. Nevertheless, it was also argued that most of these 'conflicts' are easily overcome since such projects do not occur as often as it might be thought and also because most of the activities developed at local level are supported by a good relationship among municipalities.

Yet, different viewpoints with tourism boards about the way in which budgets are spent, were also mentioned to be frequent; however, it was also argued that since the boards deal with small budgets and because the largest slice of resources is absorbed by administrative and promotional costs (see section 7.2.1), then most of these disagreements are easily overcome.

Conflicts related to differences of power between organisations were also said to be a frequent source of problems undermining the operation of regional tourism organisation (option 7). For instance, hostilities involving municipalities and some of the most powerful public sector organisations, such as the regional planning commissions (CCRs) and the regional environmental commissions (DRARNs), were mentioned to emerge sporadically. These arguments, which are not exclusive to tourism but involve also wider urban, regional and environmental matters, find their origin in policies set up by local authorities which, further, are not approved by these institutions (for an expanded analysis see section 7.3.3, 7.3.7, 7.3.8, 7.3.9).

Yet, disagreements which involve municipalities located in the coastal and the interior areas were also mentioned to be frequent. Such problems often have their origin in the fact that the most developed municipalities, located within the littoral areas, contribute larger sums of money to the budget of the boards, and, hence, want their policies to prevail²². This situation has led some participants to question whether tourism boards were established to coordinate and stimulate the tourism development process, or whether they are only used by the stronger to exert control over the weaker (see also section 7.4.3).

Finally, another source of problems which undermines the functioning of regional tourism organisation is linked to the fact that most boards are controlled by political parties. That is, despite the apparent equilibrium within the regional commissions between local authorities and public and private sector organisations (for an expanded analysis see section 5.3.2.5.3 and in particular figure 5.27), what in practice is observed is the fact that, and based on the argument that the boards are supported by resources provided by local authorities, the tourism boards are controlled by municipalities. Besides, because the local authorities are elected on the basis of political parties, what is then observed is that the election for the president of the boards has become a struggle between political parties. For instance, whereas the Algarve board is dominated by an encapsulated coalition which includes the Social Democrat and Communist

²² The budget of tourism boards is calculated on the basis of the amount of VAT which is collected in tourism establishments, such as hotels, restaurants, night clubs, casinos, etc. Areas characterized by higher levels of tourism development generate larger amounts of tourism VAT, and, therefore, contribute larger sums of money to the budget of the boards.

parties, the Rota da Luz region is controlled by an alliance that comprises the Socialist and the Popular parties. Yet, the Alto Minho board is governed by a coalition made of Social Democrats and Socialists, whereas the boards located in the Alentejo region (southern Portugal) are run by Communists.

Despite the democracy and accountability of the Portuguese political parties it is, nevertheless, found that their excessive influence in the way in which the boards are run strongly affects, and undermines, their functioning, as a result of the following. To start with, it prevents an effective participation of other members, such as private and public sector organisations. Also, the election of the board tends to follow a political rationale rather than the interests of the tourism sector. Yet, it was mentioned by several representatives of municipalities that their participation in the boards becomes too centred on their political control instead of oriented towards the resolution of tourism problems. In short, the excessive dominance of tourism boards by political parties is responsible for undermining their functioning and for preventing them from achieving better results.

7.3.14 Importance of the organisations for tourism

The study of the perception of the importance for tourism of other organisations is another issue which is commonly discussed in sociometric analyses, as a result of the following. Firstly, it affords the detection, together with the study of other variables such as connectivity and prominence (sections 7.3.1 and 7.3.3), of the strength and power of each organisation within the tourism organisation. Secondly, it helps to assess indirectly whether organisations are willing to create closer relationships with other members of the network. Finally, it enables double-checking of the findings which emerged from other questions. Bearing this in mind, the interviewees were asked to examine the relative importance of each organisation member of the regional tourism administration, according to the following 5 point scale: 5 = very important; 4 = quite important; 3 = moderately important; 2 = little importance; 1 = not important at all; 0 = no answer/don't know (see question 12, questionnaire I, Appendix II).

It should be said that this question was placed intentionally after all the other matters discussed between sections 7.3.1 to 7.3.13, since it was believed that, after discussing the characteristics and intensity of the connections established among the members of tourism administration (e.g., connectivity, frequency, reasons, basis, terms, influence, importance, compatibility, coordination and conflicts), the interviewees would be better placed to assess more accurately the importance of each organisation for tourism.

Also taking into account that the characteristics and intensity of the links set up among the members of the regional tourism administration were the subject of discussion in previous sections, then it was decided to ask the panel to answer this question from a theoretical point of view. In this section the word 'theoretical' should be understood in terms of the full contribution which each organisation may provide for the tourism organisation, in the absence of internal problems (e.g., inefficiency) or external constraints (e.g., low engagement in the tourism sector as a result of the inadequacy of the organisational framework).

The results which were obtained from this question are twofold: while some of them support findings discussed previously, others suggest that there is a gap between the reality and the perception of the panel about the regional tourism organisation.

To begin with, it is found that even from a theoretical point of view, local authorities are seen as the most important organisations within the regional tourism administration (average values of 4.38, 4.24, and 4.44 were obtained for the Alto Minho, the Rota da Luz and the Algarve respectively), which corroborates the findings introduced previously about their level of connectivity, prominence, influence, etc. Furthermore, it is also found that their importance is uneven, since there is a linear association between the 'importance of a municipality' (question 12) and the 'level of tourism development' (represented here by tourism VAT) (for a confidence level of 95% correlation coefficients of .9143, .7700 and .6668 were respectively computed for the Algarve, the Alto Minho and the Rota da Luz regions respectively). To put it more simply, the perception of the interviewees about the importance of a local authority depends on its level of tourism development; accordingly, areas located on the coastline (the 'sun-sea-sand market') are viewed as more important than those located in the interior, for the reasons introduced in chapter 5 (e.g., tourism in Portugal is linked to the 'sun-sea-sand' market; most coastal areas are socially and economically more developed than the interior regions; the history of the Portuguese development process is associated with the coastline, etc).

In second place, and unlike the findings discussed previously, it is found that private sector associations are viewed as the second most important group of organisations within tourism administration. That is, despite their low levels of interlocking (see sections 7.3.1 and 7.3.5) and influence over other agencies (see section 7.3.9), they are ranked right behind the municipalities but ahead of other public sector organisations.

The rift between the practical and theoretical importance attributed to private sector organisations also helps to draw attention to the lack of empirical evidence on which some statements brought about by specialized literature are supported. That is, although it is commonly affirmed in literature that tourism is an industry dominated by private sector

organisations, empirical evidence has failed to explain under which circumstances such an assertion is valid. That is, though the remark may be applied to generating countries, such as Germany, the UK, France, the Netherlands, etc, where private sector organisations have a strong say in tourism decisions, when viewed from the perspective of destination areas that may not be true, for two main reasons. Firstly, the private sector is often an aggregate of small sized companies (or large corporations whose headquarters are located outside the regions where they are based), with little bargaining capacity with other institutions. Secondly, because many tourism destination areas are located in developing countries (e.g., Portugal, Spain, Greece, Cyprus, etc) where public sector organisations, such as local authorities, assume a critical role in the development process, private sector organisations tend to be subordinated to strategies established by these organisations; the way in which the Portuguese regional tourism administration was established is a good example of that (see figure 5.27).

Furthermore, most public sector organisations are, generally speaking, viewed as the third most important group of organisations within the regional administration. However, it is also found that in areas characterized by higher levels of tourism development some public sector institutions, such as the urban and regional planning commissions (CCRs) and the regional environmental agencies (DRARNs), are ranked amongst the most important organisations for the tourism industry; for instance, in the Algarve region the local CCR and DRARN are ranked right behind the municipalities but ahead of most private sector organisations. Conversely, in the Alto Minho and the Rota da Luz regions such organisations are viewed with less importance than most municipalities and private sector organisations. These findings again bring empirical evidence for some of the assumptions on which Miossec's model (Miossec, 1977) is based; that is, the importance of planning and environmental matters tends to increase as tourism develops and the impact on the fauna, flora, and urban ecosystem starts to mushroom (see also sections 7.2.1, 7.3.1, 7.3.3).

Finally, the results also show that the vast majority of the interviewees recognize that tourism boards are among the most important organisations within the regional tourism organisation. Despite that, it is also found that there is a negative correlation between the importance attributed to tourism boards and the stage of tourism development. That is, in areas characterized by lower levels of tourism development, tourism boards are ranked right on the top of the most important organisations, since they are viewed as leaders and stimulators of the development process. Conversely, in regions with higher levels of tourism development there is a stronger tendency to associate development with local leadership and entrepreneurial activity rather than with actions and policies set up by the boards. For instance, while in the Rota da Luz and the Alto Minho regions the tourism boards are classified as the first and second

most important organisations for tourism respectively, in the Algarve region the local board is seen only as the 9th most important organisation, right behind the eight most developed (tourist) municipalities (Loulé, Lagos, Vila Real Santo António, Faro, Portimão, Lagoa, Albufeira and Tavira).

7.4 Strengths and weaknesses of the Portuguese tourism boards

7.4.1 Introduction

The previous sections described some of the characteristics of the Portuguese tourism boards and regional commissions (section 7.2), and the characteristics of the web of relationships established among the regional tourism participants (section 7.3). As described in chapter 6, secondary information, questionnaires (closed questions) and indepth interviews (also based on several closed questions) were found to be the most effective and convenient methods of gathering this information.

However, it was also shown before that when dealing with sociometric analysis scientists should always include open-ended questions in their research, since some interviewees are willing to speak out about topics which often cannot be disclosed by closed questions or secondary information (for an expanded analysis see sections 6.5 and 6.6). Bearing this in mind it was decided to include two groups of open-ended questions at the end of the questionnaire, with the objective of providing a indepth insight into two main problems: the strengths and weaknesses of the Portuguese RTBs (which will be discussed in the following sections) and whether the implementation of organisational forms based on the network philosophy can help to improve the functioning of tourism at regional level (this is the subject of the discussion which is introduced in the following chapter). As will also be seen later, the information collected from these questions serves to double-check responses obtained from other parts of the interview (for an expanded analysis of the reasons why open-ended questions were placed at the end of the questionnaire and not at the beginning see section 6.6).

The information collected from these open-ended questions was analysed by the use of the content analysis technique (for an expanded analysis see section 6.8.3). Answers were later fully rewritten and grouped into mutually exclusive explanatory variables, and some quantitative techniques were used to analyse this information; the results are as follows.

7.4.2 Strengths of the Portuguese tourism boards

When asked to enumerate the positive aspects about the way in which tourism boards operate in Portugal, the panel, consisting of 47 interviewees, provided 70 responses, with an average of 1.49 replies per interviewee. Since some answers overlapped each other they were further grouped into mutually exclusive explanatory categories; in the end it was found that the following 10 main points are amongst the most important strengths of the Portuguese boards.

First and foremost, 45% of the interviewees (21 nominations) argued that the most important strength of the Portuguese boards relies on their capacity to coordinate the tourism development process. That is, the boards are viewed as organisations able to bring together the amalgamation of interests contained in the tourism industry, and, therefore, to avoid the fragmentation of the tourism sector. Despite that, it is also suggested by a number of participants that a big question mark should be placed on the efficiency and effectiveness of such actions (for an expanded analysis see section 7.4.3).

Furthermore it is also found that this answer is distributed normally according to regions (Chi-Square = .865), gender (Chi-square = .683) and education (Chi-Square = .204). However, it should be said that several differences may be observed by type of organisation (Chi-Square = .014, which means that the variable is not normally distributed by type of organisation), since most of the interviewees who stated that tourism boards develop an important coordinating role are either public sector organisations (67%) or municipalities (55%); conversely only a few 11% of private sector organisations suggested the same. The explanation for these different perceptions about the same topic seems to be linked to the fact that both municipalities and public sector organisations are involved in a dense web of relationships, and, hence, many decisions which they have to take have to be coordinated with other organisations; on the other hand, most private sector companies are run independently of other organisations which makes them less sensitive to this problem (for an expanded analysis see sections 7.3.1, 7.3.3, 7.3.8, 7.3.9, and 7.3.12).

The second most important strength of the boards is said to be the activities they develop in terms of marketing and promotion. That is, 43% of the interviewees (20 nominations) recognize that tourism boards have done an important job in promoting their areas both within Portugal and abroad; according to the panel such initiatives have helped to enhance the image of their regions both with nationals and foreigners as well as to attract growing numbers of tourist flows.

Despite the fact that the statistical analysis does not show significant regional differences in the results (Chi-Square = .091), it is nevertheless observed that 50% of the interviewees who mentioned this point belong to the most developed tourism board (the Algarve), whereas the remaining 50% are members of the two other less developed tourism regions (30% in the Alto Minho and 20% in the Rota da Luz). This means that marketing and promotion are viewed as more important in areas characterized by higher levels of tourism development, since, in face of a strong tourism supply (e.g., equipment, infrastructure, attractions, etc), one of the main concerns of the operators is to attract growing numbers of visitors in order to increase rates of occupancy and make investment profitable. Finally, no significant differences are observed in the way in which this issue is raised by education (Chi-Square = .406), gender (Chi-Square = .739) and age (Chi-Square = .634). Although more private sector organisations could be expected to draw attention to this topic, it is nevertheless found that the variable is normally distributed according to the type of organisation (Chi-Square = .344).

Coordination of tourism participants and marketing and promotion are, according to the panel, the two most important strengths of the Portuguese RTBs. However, there are nine other points raised by the interviewees to which particular reference must also be made.

Among them, and thirdly, a share of 17% (8 nominations) suggest that another strength of the tourism boards is related to the fact that they help to protect and to represent local interests with respect to national level organisations. It has even been stated that without RTBs local business would not properly be taken into account in national policies, since the boards are the only channel of communication between the lower-order and the upper- tourism organisations. It is also important to say that the potential offered by tourism boards in this field is an area which finds a widespread consensus across all organisations, the reason why the assumption of normality may be accepted according to type of organisation (Chi-Square = .935); the distribution of the sample means is also normal according to region (Chi-Square = .253), gender (Chi-Square = .418), age (Chi-Square = .411), and education (Chi-Square = .446).

The fourth strength of tourism boards is, according to 11% of interviewees (5 nominations), their capacity to provide information and know-how to their members, such as data, legislation, (some) technical advice, etc. Again, it is found that there is no significant difference in the way in which this topic is mentioned according to region (Chi-Square = .267), type of organisations (Chi-Square = .861), age (Chi-Square = .237), gender (Chi-Square = .537) and education (Chi-Square = .520). It will nevertheless be seen further that this a matter which is very controversial, since there are also several participants who suggest this issue as one of the most important weaknesses which may be found in tourism boards (see section 7.4.3).

These four topics alone account for 77% of the total strengths mentioned with regard to tourism boards (i.e. 54 out of 70 nominations). The remaining 7 topics received altogether 16 nominations, and, in all situations, were raised by less than 10% of the interviewees (i.e. 4 nominations); therefore is not relevant to discuss their dispersion by region, gender, education, age and type of organisation.

Among them, it is argued by 9% of the sample (4 nominations) that tourism boards have played an important role in the management and development of tourism resources, while 6% (3 nominations) prefer to draw attention to the attempts made by the boards to implement legislation passed by the government for the tourism sector (e.g., DL 287/91), which covers important matters such as marketing, promotion, support of traditional events, etc. Linked to this later subject 4% of the interviewees (2 nominations) go even further along this idea by stating that the inventorying of the regional tourism resources is amongst the most important initiatives put forward by the boards, since they enable policies to be set up according to the peculiarity of each region; the same percentage of individuals also argue that another important feature of the boards is related to the efforts which they make to improve the quality of tourism. Lastly, 2% (1 nomination) suggest that tourism boards develop worthy initiatives when they support visitors travelling into their regions (e.g., tourism information centres), as well as when they implement actions aimed at smoothing the seasonal effects of tourism.

Finally, it is important to outline that when asked to comment on the strengths of the Portuguese tourism boards, 25% of participants stated that there is nothing positive at all in the way in which the regional tourism organisation is run in Portugal. This remark, which is exclusive to private sector agencies, the reason why this answer is not normally distributed according to type of organisation (Chi-Square = .003), draws particular attention to the state of dissatisfaction of private sector agencies towards the RTBs, which may be explained partially by their low levels of connectivity within the tourism network (section 7.3.1), low coordination (section 7.3.12), and incapacity to influence decisions (section 7.3.9).

7.4.3 Weaknesses of the Portuguese tourism boards

Despite the relatively bright picture provided by the above section about the functioning of the Portuguese RTBs, a completely different scenario emerges when the discussion moves towards their weaknesses. Indeed, the first finding which is obtained is linked to the fact that while 47 interviewees provided 70 answers about the strengths of the boards, in a total of 10 explanatory variables, the same number of individuals suggested 186 problems, in a total of 26

explanatory variables, to explain why the boards operate at low levels of efficiency and effectiveness.

To start with, 43% of the interviewees (20 nominations) argued that the lack of financial resources is the most important problem which affects the operation of Portuguese regional tourism administration. That is, it is passionately believed that short budgets prevent the boards from achieving better results.

This preoccupation, which is shared by almost 50% of the members of the panel, is echoed by the results which were discussed in section 7.2.1, since it was then demonstrated that 82% of the boards operate with annual budgets of less than PTE 200m (£0.8m), in which a good share of the resources is spent on salaries and other administrative costs; that is, small amounts of money are channeled to cover expenses in areas such as inventorying of resources, planning, research and development, etc (see table 7.1). This means, for instance, that unless other additional sources of revenue are brought into the tourism boards; joint tourism strategies and even the merger of regions are considered seriously; a better management of the available resources is implemented; situations of mismanagement, such as those reported in section 7.2.1, are overcome; etc; tourism boards will not be able to accomplish the task for which they were established; to become efficient and effective organisations capable of tackling the problems which are faced by the tourism sector within their regions; and to gain credit, and be viewed as serious partners.

It should nevertheless be pointed out that there are several variations in the way in which this issue of the lack of resources is raised by regions. Indeed, the Rota da Luz and the Alto Minho being among the boards which have to deal with shorter budgets (about PTE 150m/£0.6m) it is not surprising to observe that this problem is mentioned by 45% and 40% of their members respectively; on the other hand, only a few 10% of the Algarve tourism boards organisations argued the same, since this is the Portuguese board which manages the largest tourism budget available in Portugal across all regions (about PTE 1.5bn/£6m) (for an expanded analysis see sections 7.2.1 and 7.2.4). Apart from this remark it is found that there are no significant differences in the way in which this issue is viewed according to the type of organisation (Chi-Square = .724), age (Chi-Square = .852), education (Chi-Square = .623) and gender (Chi-Square = .383).

The second main weakness of the boards is said to be their incapacity to coordinate the large spectrum of organisations and the wide scope of interests which are to be found in the regional commissions. Although controversial, this problem is viewed as a critical matter in the regional tourism administration since, paradoxically, it is simultaneously seen as a strength and a

weakness which affects Portuguese tourism administration. To put it more simply, although it is believed that some coordination of policies and organisations has been achieved by the boards (see section 7.4.2), it is also felt that there is plenty of room for further improvement in this area.

This is explained by the fact that 40% of the interviewees (19 nominations) feel that tourism boards systematically set up policies without effective involvement of all organisations. Going further along this argument, some members of the panel accuse the boards of not bothering with other organisations and of establishing formal relationships with their members with the objective of ensuring full control over the regional administration. As an alternative to that, they suggest that policies must be built upon closer interaction of participants since only by doing that, can they become accountable, democratic, informed and comprehensive (see also section 7.3.7). This is an argument which is raised by tourism participants independently of their region (Chi-Square = .226), type of organisation (Chi-Square = .764), age (Chi-Square = .840), gender (Chi-Square = .734), and education (Chi-Square = .609).

The third weakness pointed at the RTBs, which is in accordance with the discussion introduced in section 7.3.13, is linked to the excessive influence of political parties on their activities. With respect to this 32% of the members of the panel (15 nominations) stated that the boards are too close to political interests; according to the panel, that negatively affects their operating capacity, undermines trust among participants, and prevents the administration from achieving better results. As described in section 7.3.13, it is a matter of fact that there are situations in which the boards work for the vested interests of political parties, and, as a result of that, their activities are often guided by power struggles rather than by tourism issues. This is a point of view which is similarly seen by the members of the sample, independently of their age (Chi-Square = .387), education (Chi-Square = .171), gender (Chi-Square = .957), as well as apart from the type of organisation they belong to (Chi-Square = .469).

It is nevertheless found that this issue is felt with particular intensity in boards dealing with larger budgets and where, as a result of that, governmental institutions tend to exert stronger levels of influence over their activities (see also sections 7.3.8 and 7.3.13). For instance, whereas 58% of the members of the Algarve board, the most powerful Portuguese tourism region, made explicit reference to this matter, only 33% and 8% of the Rota da Luz and the Alto Minho tourism participants respectively suggested the same. This also helps to explain why the sampling distribution of the mean is not normal across the three regions (Chi-Square = .027), as well as why there is a negative correlation between the 'importance given to the presence of politicians in the tourism board' and the 'budget of the tourism board' (for a significance level of 95% a negative (Pearson's) correlation of 32% is found).

The fourth main problem which is suggested, by 32% of the members of the panel (15 nominations), to undermine the functioning of the regional tourism administration is linked to the lack of accountability and democracy in the way in which some representatives are appointed to the regional tourism commissions. That is, empirical evidence is found to support the discussion introduced in section 7.2.2, where it was commented that most representatives of private sector associations are not appointed according to legitimate procedures, which makes them vulnerable to manipulation and undermines their capacity to influence decisions. The statistical analysis also shows that this criticism is evenly raised by tourism participants, the reason why the assumption of normality may be accepted according to regions (Chi-Square = .187), age (Chi-Square = .837), education (Chi-Square = .320), and gender (Chi-Square = .220).

However, particular attention should be drawn to the fact that this matter shows strong variations according to the type of organisation (Chi-Square = .043); in fact, and perhaps surprisingly, this is an issue which is mostly raised by private sector organisations. For instance, whereas 56% of the private sector associations drew attention to this question, only 32% of municipalities, 25% of tourism board presidents, and 17% of public sector organisations made the same remark. In short, private sector agencies are particularly aware of this situation, maybe because they have already realized that only may their power within the boards increase by tackling this issue.

The fifth main source of problems undermining the functioning of tourism at regional level is said to be related to be the lack of qualified staff; this a finding which supports some arguments introduced previously. That is, it was shown in section 7.2.1 (see in particular figure 7.4) that only a few 12% of the staff working for the boards have a high standard of education, and also that the vast majority of them do not have any particular background in tourism, which is also a situation that affects the members of the regional tourism commissions (see section 7.2.7 and in particular figure 7.10). Aware of this situation 30% of the interviewees (14 nominations) argue that most of the professionals working for the boards are not tailored for the job; that few organisations contact the boards because they cannot help them that much; and also that the boards have not yet realized that without professionals specialized in tourism they will never be able to assume the leading and coordinating role which most participants would like to see. This argument is similarly perceived by the tourism participants independently of their age (Chi-Square = .923), education (Chi-Square = .649), gender (Chi-Square = .890), region (Chi-Square = .443), and type of organisation (Chi-Square = .971).

Linked to the issue of the lack of qualified staff there is still a share of 30% of the members of the panel (14 nominations) who argue that tourism boards do not produce enough and reliable information capable of helping them in decisions they have to take. This argument brings empirical evidence to support comments introduced previously, about the way in which the budget of tourism boards is spent; that is, in the face of short budgets and large expenses on administration, marketing and promotion, few resources are channeled to support costs in areas such as inventorying, data collection, technical advice, research and development, etc (see section 7.2.1 and in particular table 7.1). The consensus reached in this matter is so widespread that the sampling distribution of the means is normal according to regions (Chi-Square = .124), type of organisation (Chi-Square = .138), education (Chi-Square = .058), age (Chi-Square = .421), and gender (Chi-Square = .890).

The interference of the national government in activities developed by some boards is another matter which is revealed, by 30% of the interviewees (14 nominations), as weakening their operations. This finding brings more empirical evidence to the comments introduced in sections 7.3.8 and 7.3.13, when it was shown that one of the most frequent sources of conflict within the regional tourism organisation involves clashes between regional and national level organisations. As also discussed before, such situations assume particular intensity in areas characterized by higher levels of tourism development, due to their impact on the regional and national economies. Bearing this in mind it is not surprising to observe that the vast majority of the members of the panel who raised this problem (71%) are members of the Algarve board, where there is indeed a larger number of representatives of the national government (for an expanded analysis see sections 7.3.8 and 7.3.13); this also helps to explain why this variable is not normally distributed according to region (Chi-Square = .002). Apart from this remark, it is found that this preoccupation is similarly shared across the members of the panel independently of their age (Chi-Square = .116), education (Chi-Square = .575), gender (Chi-Square = .623), and type of organisation (Chi-Square = .412).

The eighth main weakness pointed at tourism boards is argued to be the size of the regional commissions. That is, 26% of the interviewees (12 nominations) state that regional tourism commissions are too large, include too many different interests and, as such, have proved incapable of accomplishing the functions for which they were set up; that is, to work as platforms which ensure the inter-organisational coordination of policies. This criticism, which is raised independently of the region (Chi-Square = .630), type of organisation (Chi-Square = .597), and age (Chi-Square = .272), education (Chi-Square = .698) and gender of the interviewees (Chi-Square = .091), has strong links to the discussion introduced in section 7.3.4, when it was described why some boards show clear signs of fragmentation. That is, in face of the incapacity demonstrated by the boards to bring together the amalgamation of

interests present in the tourism industry, the participants blame that on the size of the regional commissions rather than on the inefficient and ineffective way in which the RTBs are operated.

The ninth issue which is suggested, by 23% of the interviewees (11 nominations), to damage the operation of Portuguese regional tourism organisation is linked to the amounts of money which ought to be spent on promotion. As a result of legislation passed in 1991 (DL 287/91) tourism boards must spend at least 50% of their budget on marketing and promotional activities. However, and has also been pointed out previously (see section 7.2.1), this strongly affects their functioning for three main reasons: firstly, the vast majority of the resources is channelled for promotional and administrative expenses, while none or very small amounts of money are spent on a number of other important areas, such as inventorying, planning, development, technical advice, etc (see table 7.1); secondly, dealing with few resources many promotional actions result in situations of mismanagement; finally, regions with different levels of tourism development have to follow the same directives which is absurd (for an expanded analysis see section 7.2.1). In short, and as far this issue is concerned, instead of providing a good framework of reference for the boards accomplishing a good job, legislation has, on the contrary, obstructed their functioning and promoted mismanagement. This is a problem which is viewed equally across the three tourism boards, the reason why this variable is normally distributed according to region (Chi-Square = .316), type of organisation (Chi-Square = .628), education (Chi-Square = .337), age (Chi-Square = .528) and gender (Chi-Square = .629).

These are the nine most important issues which are seen as responsible for damaging the Portuguese regional tourism organisation; altogether they account for 72% of the total problems (i.e. 134 out of 186 nominations). However, there is still a second group of (less important) aspects for which reference must also be made. Due to the low frequencies of their occurrence dispersion measures will not be used further.

To begin with, 15% of the interviewees (7 nominations) affirm that two other additional sources of problems are the excess of bureaucracy and the lack of dynamism in which most boards operate. According to the panel this may be explained by the fact that they are run under a public sector philosophy as well as because private sector associations have little influence in their operations.

Also, 13% (6 nominations) mention that the present legislative framework has brought little powers to the boards, which makes them handicapped in dealing effectively with the tourism development process as well as being taken seriously by other official organisations. Yet, 13% argue that since tourism boards are weakened by so many constraints (e.g., size, conflicts, lack

of power, etc) then other organisations simply do not pay enough attention to them because they see that as a waste of time.

Furthermore, 11% of the members of the panel (5 nominations) state that since RTBs are controlled by municipalities and, in most situations, tourism is not amongst their priorities, because many of them are still facing major difficulties in critical areas, such as water and power supply, sewage, accessibility, education, etc, tourism is viewed as a less important issue among other matters. In order to support this point of view some of them drew attention to the fact that in a number of situations local authorities are represented in the tourism boards not by their presidents but by vice-presidents instead (it has indeed been shown that while 36% of the representatives of the municipalities are presidents, the remaining 64% are vice-presidents - see table 6.2a).

Yet, 9% (4 nominations) justify the weaknesses of the RTBs as a result of the following four aspects. Firstly, since Portuguese tourism is excessively bound to coastal areas (see section 5.3.2.3), most regions located in the interior have little influence in the decision-making process, which brings strong imbalances of power into the administration. Secondly, because there are not clear links between some tourism representatives and those they are supposed to represent, personal rather than collective interests tend to flourish. Thirdly, there are situations in which a single person represents more than one association which, of course, brings discredit to tourism administration. Fourth, despite their small size most boards prefer to work in isolation instead of setting up strategic alliances, or even mergers, with other boards capable of boosting their power and capacity to intervene in the development process.

Again, 6% of the interviewees (3 nominations) argued that the legislation which established the boards is not clear enough about what they are to achieve, which makes their operation grey and ambiguous. Also, 4% (2 nominations) mention that the elections of the boards should be always after the local elections in order to avoid some bizarre situations in which the representatives of local authorities are no longer members of the local authorities. The same percentage of participants suggested yet that clearer laws should be passed with regard to the way in which tourism VAT is distributed by the boards, since some procedures used by the national government are not enough transparent.

Furthermore, 2% of the interviewees (1 nomination) stated, in accordance with the findings discussed in section 7.3.9, that the presidents of the boards should not be allowed to stay in power for long periods of time, since they become less dynamic and lose the capacity to influence other organisations. Yet, 2% suggested that another issue damaging the functioning

of the boards is linked to the poor coordination which they establish with other regions as well as with the national government.

The same share of individuals also believe that tourism boards operate under low levels of efficiency and effectiveness because many presidents are 'appointed' by political parties even though they are not fit for the job; this is an answer that again draws attention to the excessive influence of political parties in the activities developed by the boards. The close liaison between the boards and the local authorities is another issue which is viewed, by 2% of the interviewees, as responsible for undermining their functioning. Finally, the same share of individuals explain the weaknesses of tourism boards as a result of the low level of education and awareness shown by the public for tourism problems.

7.4.4 Evaluation of the Portuguese tourism boards

After having analysed the characteristics of the contacts established among the organisations represented in the tourism boards in terms of connectivity, prominence, cliques, frequency, reasons, basis, terms, influence, importance, compatibility, coordination, and conflicts (section 7.3), and also after having discussed the strengths and weaknesses of the tourism boards (section 7.4), the interviewees were asked to provide a global measure to characterize the efficiency and effectiveness of the Portuguese boards, according to the following five point scale: 5 = very good; 4 = good; 3 = reasonable; 2 = bad; 1 = very bad; 0 = do not know / no answer (see Part IV, questionnaire I, Appendix II).

The answers obtained from this question allow double-checking of some of the findings discussed previously. That is, despite it being considered that tourism boards offer the potential of tackling the problems faced by the Portuguese tourism industry it is nevertheless believed that much has to be done in this field if they are to succeed (see sections 7.2 to 7.4.3). Taking into account the whole sample it is found that the Portuguese RTBs are assessed with a 2.98 mark, which reveals a negative image about their functioning. Reference should also be made to the fact that while 28.6% of the panel considered that the work done by the boards is bad, a few 26.2% argued the opposite (45.2% consider the boards more or less efficient and effective).

These results show very small variations by region (2.85, 2.93 and 3.00 in the Rota da Luz, the Algarve and the Alto Minho boards respectively), the reason why they may be considered normally distributed according to region (Chi-Square = .393); the results are also normally distributed according to type of type of organisation (Chi-Square = .495), and age (Chi-Square

= .052), gender (Chi-Square = .274) and education of the interviewees (Chi-Square = .314), which reflects a strong unanimity on this matter.

7.5 Conclusion

This chapter focused on the operation of Portuguese regional tourism organisation in terms of its characteristics, efficiency, effectiveness, strengths and weaknesses. As discussed, although providing a legislative framework which, to a certain extent, incorporates some of the trends which were debated in previous chapters (e.g., flexibility, involvement of a wide scope of interests linked to the tourism sector, great level of economic and administrative autonomy, etc), it is also a matter of fact that most Portuguese RTBs operate at low levels of efficiency and effectiveness.

It is found that as a result of the flexibility allowed by legislation Portuguese regional tourism administration resembles a 'jigsaw puzzle' (see map 5.6), whose boundaries do not follow a 'tourism rationale' but instead a criteria of convenience which are established among different municipalities, such as friendship and political (in)compatibility. In addition to that, the administrative division of the Portuguese regional administration finds no links to other administrative boundaries adopted by other departments, such as tourism promotion, planning, environment, agriculture, etc, which makes the horizontal coordination of tourism policy and strategies, which are set up by other departments, very difficult to achieve (see also chapter 5).

The excessive flexibility provided by legislation has also brought about other problems in the Portuguese regional tourism administration. For instance, despite its small size there are already 19 tourism boards operating in Portugal. Although responsible for promoting their regions both within Portugal and abroad, if research was conducted in Portugal it would certainly be found that, with the exception of the Algarve board and the Estoril Coast, the vast majority of the Portuguese population would fail to recognize the existence of most tourism boards, what they are for, and their location. Even students reading for tourism courses in Portuguese universities show little awareness of what these boards are all about, often confusing them with the Portuguese promotional regions (map 5.5).

The excessive flexibility created by legislation has been responsible for having produced boards which rely on very short budgets as well as on only a few qualified staff (see section 7.2.1). As a result of this, Portuguese tourism boards show low capacity to intervene with efficiency and effectiveness in the tourism development process, since, in addition to their short budgets, the largest share of resources is spent on administration and on (ineffective) promotional actions

(section 7.1). For instance, it was shown that the amount of resources channelled into 'studies, projects and consultation' amounts to a mere 1.17% of the tourism boards budgets (see table 7.1), and there are even areas with relatively large tourism demand and supply which are not covered by any board, which means that tourism development in those places is not the subject of any regional tourism strategy (see figure 7.1).

Furthermore, the problems which are faced by the Portuguese regional tourism administration do not result only from the legislative framework passed by the government, since its functioning is, also, strongly affected by the type of operating philosophy which is followed by most tourism boards. It was shown that the potential offered by regional tourism commissions, which are supposed to work as coordinating forums close to the boards, is enormous, since they include the representatives of a number of organisations associated with the sector (e.g., hotels, restaurants, travel agencies, rent-a-car, planning, environment, commerce, and so forth) (see section 5.3.2.5.3); most of their members have high qualifications and, thus, may play an important advisory role to the boards (see section 7.2.7); and the organisations these members represent produce information of great importance for the design of regional policy.

Nonetheless, what is also found is the fact that tourism boards operate in isolation from their members, which means that policies are set up within their headquarters by a handful of poorly qualified staff (see sections 7.3.7 and 7.4.3). As a result of that, regional polices offer poor quality and little capacity to tackle the problems which are faced by the tourism sector (see section 7.4.3); fail to represent all interests and groups associated with the tourism sector (i.e. are unaccountable); and have led to the fragmentation of regional administration (see section 7.3.4).

Despite the fact that tourism boards are supposed to work as coordinating agencies for the tourism development process what is also found is that there is little coordination between policies set up by tourism boards and their members (see section 7.3.12 and 7.3.9), which may easily be understood from the fact that the relationships which are established between boards and participants are infrequent (see section 7.3.5), since they are restricted to the attendance of formal meetings (see section 7.3.7).

The inefficiency and ineffectiveness shown by regional tourism organisation in dealing with the tourism development process within their regions, raises serious doubts about the direction of Portuguese tourism. That is, despite the growing numbers of tourist arrivals in Portugal (see section 5.3.2.1) and their positive impact on the economy (see section 5.3.2.4), what is also found is that little emphasis has been placed on the impact produced by tourism at local level. To put it in a different way, what this thesis shows is the fact that the Portuguese government

has failed to set up regional tourism administrations capable of, with efficiency and effectiveness, dealing with the tourism development process at regional/local level, not only in terms of adjusting tourism industry to the particularity of each place, but also in terms of optimizing the indirect and induced economic impact produced by the sector.

The concern which is raised here is based not only on theoretical considerations (see chapter 2) but also on the preoccupation which is shown by the members of Portuguese regional administration, the reason why they evaluate the efficiency and effectiveness of Portuguese boards with a mark of 2.98 out of 5, which is below the minimum acceptable level (3.00) (see section 7.4.4). Moreover, the need for regional agencies responsible for the coordination of the organisations linked to the tourism sector is not, again, a theoretical issue, since it is also proved here that the way in which the organisations associated with the tourism sector operate imply some sort of horizontal coordination among them. It was seen that, beyond the 'official' framework which was established by legislation passed by the government, there is also an informal network of relationships which bound tourism participants together (see sections 7.3.6, 7.3.7, 7.3.8 and 7.3.10). The need for more efficient and effective regional agencies will also be demonstrated in the following chapter, while discussing the way in which tourism participants react to the (hypothetical) establishment of networks in Portugal.

Chapter 8

Data analysis II - tourism networks

8.1 Introduction

It was seen in the previous chapter that the Portuguese regional tourism administration is undermined by several critical problems which are associated both with the way in which the planning process is carried out ('procedural component') and with the organisational framework which supports the functioning of tourism boards ('administrative component'). In accordance with the objectives which are proposed in this thesis (see section 6.2 and figure 6.1), in this chapter alternative ways capable of improving the efficiency and effectiveness of regional tourism administration will be analysed.

As discussed in chapter 4, networks are forms of administration which growing numbers of organisations linked to business and non-profitable areas have decided to adopt in the planning and management of their activities. It was seen that when applied to tourism, networks may bring significant improvements not only into the planning process but also into the administrative structure in which the planning activity is carried out (see chapter 4).

It was shown in chapter 7 that the way in which the Portuguese regional tourism administration operates is based on an informal, though weak, networking of organisations (see sections 7.3.6, 7.3.7, 7.3.8 and 7.3.10). Moreover, it was seen that there is at present profound dissatisfaction with the functioning of tourism boards, since policies are set up in a formal and top-down way, while most participants would like to be viewed as active members rather than simple spectators of the development process (see sections 7.3.7 and 7.4.3).

Based on this assumption, and in accordance with the research objectives which were proposed for this thesis (see section 6.2), the objective of this chapter is to examine whether tourism participants would welcome the replacement of the bureaucratic way in which tourism boards are run at present in Portugal, by horizontal forms of administration based on the network philosophy; and the benefits and disadvantages which may be produced by this type of administration (see chapter 4 and section 3.3). The information which is reported in this chapter is based on data collected from the interview-questionnaires conducted in Portugal (see Interview-questionnaire, Parts III and IV (Group 2), Appendix II; sections 6.6 and 6.7).

The way in which 'tourism networks' were introduced to the interviewees may be summed up as follows. First of all, every member of the regional tourism commissions (see section 5.3.2.5.3) would be responsible for setting up an individual strategy for the group of organisations which they represent (e.g., travel agencies, hotels, municipalities, urban and regional commissions, etc). Such individual strategies would have to emerge from discussions taken within the organisations / associations / institutions they represent, and therefore would have to be supported by the majority of their members. In order to achieve that, clearer methods would have to be introduced, in particular in the way in which the representatives of private sector associations are appointed to the boards (see section 7.2.2).

Secondly, instead of working exclusively on an individual basis, organisations would also agree on the establishment of tighter links among themselves and on mutual forms of cooperation, such as exchange of information, inter-sector coordination of policies, exchange of expertise and know-how, etc.

Thirdly, instead of assuming full responsibility for the development process tourism boards would centre their actions in bringing together the individual policies set up by their members (coordination), as well as in providing them with technical expertise. That is, regional tourism policies would be set up in a horizontal rather than in a top-down approach (for an expanded analysis see chapter 3). By adopting this approach tourism boards would also seek to achieve closer cooperation among all participants; to increase their engagement in the decision-making and taking process; to make strategies more informed and accountable; and to ensure a full optimization of resources (e.g., economic resources and manpower).

Two main criticisms may be pointed out to the way in which the network model was presented in this thesis to the interviewees. The first arises from the fact that, as a result of the relatively low level of maturation of network literature (see sections 4.2 and 6.4), networks are often

presented by academics as a 'nice' alternative to the 'hierarchical' and 'market' models; hence, respondents may be influenced in their responses.

It will be seen later that part of the enthusiasm demonstrated by some respondents about networks (see sections 8.2.1 and 8.2.2), may, to a certain extent, be understood as a result of that. To put it in a different way, despite the fact that positive and negative aspects about the operation of networks were brought into the Interview-Questionnaire in order to provide a balanced way of their functioning (see Q17 to 28, Part III, Interview-Questionnaire, Appendix II), it seems that a more balanced perspective could have been achieved. It is, nevertheless, believed that such a situation may, and should, be overcome in the future by other researchers, as growing numbers of networks are set up and new evidence about the strengths and weaknesses of their operation start to emerge.

Second, although the way in which networks were introduced to the interviewees may be considered too simplistic, since it does not provide clear guidelines about matters such as which organisations would be included in the network; how a closer inter-sector coordination of policies would be achieved; the responsibility of each member in the network; etc, it offers, nevertheless, sufficient potential to assess some of the key questions which are at the core of the discussion of this thesis. For instance, and to begin with, the 'model' affords an evaluation as to whether organisations would be willing to get involved in forms of administration which are responsible for increasing their levels of commitment, both in terms of power and responsibility. In second place, the 'model' also affords an evaluation of whether participants would accept changing some working styles and operating philosophies with the exclusive aim of becoming more compatible with other agencies. Furthermore, it provides an insight into the advantages and disadvantages which could spring from the implementation of networks. Finally, it is possible to assess whether the arguments suggested by literature about networks (see chapter 4) are compatible with reality and, therefore, can be put into practice. These are some of the most important issues which will be debated in the following sections.

8.2 Arguments for and against the implementation of tourism networks in Portugal

8.2.1 Willingness to join a network

The first question which the interviewees were asked was whether they would be willing to join a network of organisations based on the principles discussed previously, according to the following five point scale: 5 = very willing; 4 = quite willing; 3 = moderately willing; 2 = not

very willing; 1 = not willing at all; 0 = no answer/don't know (see question 13, questionnaire I, Appendix II).

The results show that only 1 out of 47 of the interviewees (2%) would not be willing to accept a network of tourism organisations in substitution of the present administration. It is also found that whereas a few 15.6% of the members of the panel would be moderately willing to join a tourism network (option 3), 26.7% stated that they would be quite willing (option 2), while 55.6% affirmed that they would be very willing to do so (option 1). That is, the implementation of tourism networks collects the favourable approval of the vast majority of the organisations linked to regional tourism organisation. The results do not show any significant statistical variations, the reason why levels of normality are accepted according to type of organisation (One Way Anova, F test = .467), region (One Way Anova, F test = .325), age (One Way Anova, F test = .758), education (One Way Anova, F test = .301), and gender (One Way Anova, F test = .508).

The reason why tourism networks collect such overwhelming support from tourism participants may be summed up in three main points. To start with, there is at present profound frustration with the way in which RTBs run the tourism sector in Portugal (see section 7.4.4). Furthermore, the vast majority of the members of the panel consider that tourism boards have failed to bring together the amalgamation of interests involved in the tourism sector, the reason why it is argued that most policies and actions set up in the field are fragmented and uncoordinated, when, due to the characteristics of the tourism industry (see section 1.4), the tourism sector demands closer involvement and coordination among all organisations (see sections 7.3.1, 7.3.7, 7.3.9, 7.3.12, and 7.4.3); hence, networks are viewed as having the potential to improve the present administration. Finally, networks are seen as having the potential to bring additional strengths to the tourism industry and to make regions more competitive in the world tourism market (see section 8.2.5 and 8.2.6).

8.2.2 Willingness to change some operating philosophies and working styles in order to become more compatible with other organisations

As discussed in chapter 4, a network of organisations implies a certain standardization of operating philosophies and working styles (e.g., periods of the year in which organisations set up their annual plans of activity; ways in which information is collected and analysed; software and hardware utilized; etc), in order to make communication among them possible and easier. With respect to this, the panel was asked whether they would be willing to change some operating philosophies and working styles within their organisations in order to facilitate the

implementation of tourism networks, according to the following five point scale: 5 = very willing; 4 = quite willing; 3 = moderately willing; 2 = not very willing; 1 = not willing at all; 0 = no answer/don't know (see question 14, questionnaire I, Appendix II).

The results show that all respondents (100%) would be willing to introduce changes in the operating philosophies and working styles of their organisations in order to facilitate the implementation of networks. Due to the low dispersion of answers no significant deviations are observed in the results, the reason why this variable is normally distributed according to type of organisation (One Way Anova, F test = .306), region (One Way Anova, F test = .739), age (One Way Anova, F test = .853), gender (One Way Anova, F test = .459), and education (One Way Anova, F test = .960).

Furthermore, and in accordance with the previous section, whereas a (small) share of 15.6% of the interviewees revealed that they would be moderately willing to do so (option 3), an overwhelming majority of 84.4% stated that they would be quite or even very willing (options 1 and 2) to introduce changes in order to make them more compatible with other partners in the network. In short, no major operational obstacles would prevent the implementation of regional tourism networks in Portugal.

8.2.3 Network coordination

Another important matter which ought to be discussed in this thesis, and which is common to other sociometric studies, is related to which organisation should assume the coordinator role within the network. With regard to this, the interviewees were asked to nominate the agency which best could develop this if tourism networks were to be implemented in Portugal (see question 15, questionnaire I, Appendix II).

The results show, in accordance with other findings introduced previously (see section 7.3.14), that the vast majority of the tourism participants (78%) agree that tourism boards would be the organisations with the right profile to assume this role. This finding draws attention again to the fact that most of the criticism which is raised against tourism boards (see for instance section 7.4.3) is related to their inefficiency and ineffectiveness to deal with the tourism development process rather than to their real importance (see also section 7.3.14). Furthermore, it is seen that no significant regional variations are detected in the way in which this matter is seen across the three tourism boards. For instance, whereas 85% of the members of the Alto Minho region elect their board as the right organisation to head a tourism network, 81% and 67% do the same in the Rota da Luz and in the Algarve regions respectively, the reason why the distribution is

normal according to regions (One Way Anova, F Test = .592); the sampling distribution of the mean is also normal according to type of organisation (One Way Anova, F Test = .459), age (One Way Anova, F Test = .164), gender (One Way Anova, F Test = .267) and education (One Way Anova, F Test = .781).

It should nevertheless be mentioned that 7% and 5% of the respondents would rather prefer to see the regional planning commissions (CCRs) and the Universities respectively, as coordinators of (hypothetical) tourism networks, for the following reasons. Whereas the CCRs are viewed as powerful organisations with great persuasive capacity with regard to other government and non-government organisations (see sections 7.3.9, 7.3.2, 7.3.5), the universities are seen as institutions which could bring more informed solutions into the decision-making process, as well as having the capacity to put an end into the tight links which exist at present between the boards and the political parties, since decisions would start to be taken from a rational rather than from a political point of view (see section 7.3.13).

8.2.4 Aim of tourism networks

Despite the large consensus which is found in relation to the matters analysed previously, a slightly different scenario emerges in relation to the objectives which should be pursued by networks (see question 16, questionnaire I, Appendix II). Although the majority of the respondents (51.1%) affirmed that the top priority of a network should be the preparation of policies (option 2), 28.3% stated that they would prefer networks oriented towards the improvement of communication among participants (option 4), while 13% suggested that the control of the tourism development process (option 3) should be placed on the bottom line of their operations.

The results also show that there are several regional variations in the way in which this question was answered by the panel. For instance, while over 50% of the interviewees in the three tourism boards (the Alto Minho, the Rota da Luz and the Algarve) would be more inclined towards networks whose central objective was the preparation of policies, it is, nevertheless, found that in areas characterized by higher levels of tourism development there is also a significant share of individuals who would welcome networks oriented towards the control of the tourism development process. For instance, whereas a few 7.7% and 14.3% of the interviewees in the Alto Minho and the Rota da Luz regions respectively are in favour of a 'control-model', in the most developed Portuguese tourist area (the Algarve) there is a larger group of participants greeting such an option (18.8%). This may be explained by the fact that the tourism sector has already reached a high stage of development in this region, and,

therefore, its impact on the local environment, society and economy is viewed as an issue which ought to be tackled by the administration.

A similar situation is also found in relation to those participants who elect a communication model as the most suitable form of network to be implemented in Portugal. Again in areas characterized by higher levels of tourism development there is a larger number of interviewees who argue that networks should promote closer links among the organisations involved in the tourism sector, and, thus, suggest implicitly that policies should be set up individually within each organisation. For instance, whilst in the Algarve region 31.3% of the participants would welcome a communication model, only 21.4% and 23.1% of the Rota da Luz and the Alto Minho tourism members respectively, argued the same.

In short, the results show that if networks are to be established, they cannot follow the same rationale which was used to set up the present tourism boards. Evidence shows that priorities vary from region to region, and, therefore, legislation must be flexible enough to allow participants to decide what type of model best suits their interests.

8.2.5 Competitive advantages created by networks

It was seen previously that policies set up by the tourism boards show very low levels of inter-sector coordination (see sections 7.3.12, 7.4.3), and fail to respond to the problems which are faced by the members of the administration (see sections 7.3.1 and 7.3.5); as a result of this, there are situations in which organisations look for alternative solutions to their problems within the organisational framework provided by the Associations of Municipalities (see section 7.3.4).

Taking these problems into account it is then not surprising to find that when asked to comment on whether the development of closer cooperation among all organisations, provided by networks, would bring them renewed strengths to compete with other destination areas (see question 17, questionnaire I, Appendix II), 100% of the interviewees agreed with that. No statistical variations are, of course, observed by regions, type of organisation, age, education and gender, due to the low dispersion of results. In conclusion, the results show that tourism networks are viewed as an alternative organisational framework which is capable of stimulating closer cooperation among all participants; of prompting tighter inter-organisational coordination of policies; of making organisations to work towards similar objectives; and, hence, of making destination areas more competitive and stronger in this increasingly globalized travel and tourism market.

8.2.6 Potential offered by networks to face situations of crisis and recession

The need to set up in the future closer inter-sector cooperation and coordination among all participants, analysed in the previous section, is again underlined by the findings which are obtained from question 17 (see questionnaire I, Appendix II). Indeed, when asked whether a network of organisations could strength the capacity of the (regional) tourism sector to face situations of crisis and recession in the markets, 97.7% of the members of the panel agreed with that. That is, networks are viewed as organisational frameworks which may bring renewed strengths to the tourism industry to face situations of instability in the markets.

This finding brings empirical evidence to the argument which was presented in chapter 4 (see section 4.4), when it was suggested that, by shifting the emphasis from a micro-economic view of the system towards a broader one, networks may bring tourist destinations stronger capacity to compete with other destination-areas; greater stability in their operations; and renewed strengths to deal with situations of recession and crisis in the markets. The same comments may be applied to the remarks which were introduced in section 2.4.2, when it was discussed that action is needed to revert the declining tendency of European tourism. What is seen now is the fact that, by bringing greater competitive capacity (see section 8.2.5) and stability into regions, networks offer an alternative way in which this problem may be tackled.

8.2.7 Capacity of networks to lead to more informed solutions

The discussion which took place in chapter two demonstrated that in future policies must be set up through a direct involvement of all participants, in order to allow a full and rational utilization of resources and skills. However, it was also seen in chapter 3 that the formal and hierarchic organisational philosophy which supports the functioning of most public sector organisations fails to achieve that, since in most situations decisions are taken according to a top-down approach by a handful of decision-makers. That is, organisations belonging to the lower levels of the administration are only asked to implement policies and, therefore, have a minor participation in the way in which strategies are established. The case of the Portuguese RTBs is a good example of that since decisions often rely on the tourism boards, whereas the other members of the tourism organisation are only called to approve them (see sections 7.3.7 and 7.4.3).

Taking into account these comments the answer provided by the members of the panel, when questioned whether a tourism network could bring an effective voice and participation to more organisations and lead to more informed decisions, is no surprise (see question 19, questionnaire I, Appendix II). That is, since networks are characterized by stimulating stronger levels of interaction among organisations; for prompting 'lateral thinking'; and for more extensive forms of involvement of all participants in the decision-making process (see chapters 3 and 4), a vast majority of 87% of the interviewees agree with the statement that networks may lead to better informed solutions (6.5% disagree and 6.5% neither agree nor disagree with the statement). Due to the very low dispersion of answers the results may be accepted as being normally distributed according to regions, type of organisation, age, education and gender.

8.2.8 Management and allocation of resources

It was seen in chapters 5 and 7 that in spite of the fact that tourism boards are responsible for the inventorying, planning and management of tourism resources, they have failed to achieve their goals, since they lack money and qualified staff (sections 7.2.1 and 7.4.3), and their operations are excessively centralized in their headquarters (see sections 7.3.7 and 7.4.3). The incapacity shown by the boards to establish comprehensive regional policies may also be seen as a consequence of that (see section 7.3.4).

Since a direct involvement of all partners may lead to the development of more comprehensive and inclusive approaches and stimulate better utilization of resources, not surprisingly 80.4% of the interviewees agreed with the argument that the setting up of networks may lead to better planning and management of regional tourism resources (4.3% disagree while 15.2% neither agree nor disagree) (see question 20, questionnaire I, Appendix II). Due to the great similarity of answers (i.e. low variance), the results are normally distributed according to region, type of organisation and education, age and gender of the interviewees.

8.2.9 Efficiency and effectiveness of policies

Based on the same arguments which were introduced in the previous section (i.e. networks stimulate closer liaisons among organisations and, thus, lead to better planning and management of resources), it is also found that the vast majority of the members of the panel (95.7%) believe that networks would be able to improve the efficiency and effectiveness of tourism policies, since they would be richer, more adjusted to the reality, as well as being supported by a wider range of participants (notion of accountability) (2.2% disagree and 2.2%

neither agree nor disagree with the statement) (see question 21, questionnaire I, Appendix II). In short, networks are viewed as having the potential to improve the 'procedural component' of the planning process (see section 6.2; figure 6.1). Again, no statistical differences are observed in the results according to region, type of organisation, education, age and gender, as a result of the low dispersion of answers.

8.2.10 Impact of networks on market functioning

It was argued in chapter 4 that a main advantage which may spring from networks is related to the fact that, by improving the communication channels among organisations, they may also enhance the market transparency and, hence, its functioning. Viewed from a market point of view that can be seen as a positive aspect; however the same may not be said from the perspective of some organisations, since there are situations in which they create competitive advantages on the basis of information to which their direct competitors do not have access.

Bearing in mind these two opposite points of view the members of the panel were asked whether the establishment of networks could damage the market functioning as well as the profitability of some operators (question 22, questionnaire I, Appendix II). The results show that 3 out of 4 respondents believe that the improvement of the communication channels and the exchange of information among organisations would not damage either the market functioning or the profitability of some organisations (11.4% agreed with the statement and 13.6% neither agreed nor disagreed). On the contrary, it was argued that since networks may create stronger forms of administration, that could also boost the creation of more competitive regions and, hence, a more profitable industry.

This finding is similarly shared by both private and public sector organisations, the reason why the distribution of the sample means is normal according to type of organisation (One Way Anova, F test = .504); it is also found that there is no statistical differences in the results according to age (One Way Anova, F test = .905), education (One Way Anova, F test = .288), gender (One Way Anova, F test = .434), and region (One Way Anova, F test = .923).

8.2.11 Inter-organisational coordination of policies

Another important advantage which, according to literature, may come out from networks is linked to the fact that decisions are not set up from a hierarchical top-down perspective (see section 3.2 and in particular figure 3.1), but, instead, from a corporate and integrated view of

the system; i.e. policies are established through the involvement of all interests included in the system (see section 3.3 and in particular figure 3.3). According to literature, such a situation is also responsible for leading to closer coordination among all agencies, because they start operating with tighter links to each other.

Bearing that hypothesis in mind the panel was asked whether the implementation of a network could improve their access to information produced by other organisations and, therefore, lead to higher inter-sector coordination of policies and to higher transparency in the way in which the market operates (see question 23, questionnaire I, Appendix II). The results show that there is an overwhelming agreement (93.5%) that networks may indeed facilitate the access to information available in other organisations and, thus, increase the inter-sector coordination of policies (2.2% of the interviewees disagree with this viewpoint whereas 4.3% neither agree nor disagree). As a result of small dispersion, the distribution of the sample means is normal according to type of organisation, region, age, education and gender.

8.2.12 Impact on non-profit organisations

It was seen previously that a main problem which affected the functioning of tourism up to the 1980s was related to the fact that most of the approaches adopted in the sector were guided excessively by short-term profit, while little importance was given to matters linked to the environment and society (see sections 2.2.2 and 2.3.2). However, there is nowadays growing awareness that if tourism is to succeed it has to be supported by comprehensive and inclusive policies, which ought to be designed through the involvement of all interests linked to the sector (see section 2.4.2).

It was also shown before (see chapter 4) that, as far as this matter is concerned, networks offer the potential to revert this situation, since decision centres are pushed downwards in the administration and, hence, policies become more responsive to a wider range of areas and interests. However, there is also evidence which suggests that networks are often set up to respond to situations of fierce competition, and, as a result of that, large and profitable companies and agencies are amongst the organisations which are most likely to succeed within this framework, while non-profit organisations may be unable to follow their pace (see section 4.5).

Bearing in mind these considerations, the perception of the panel on this matter was examined; participants were asked whether the establishment of tourism networks in Portugal could damage even further the (weak) links of non-profit agencies to the tourism sector (see question

24, questionnaire I, Appendix II). The results show that while 67.4% of the interviewees argued that networks would not affect the importance of non-profit organisations, 25.6% suggested, instead, that they could damage them. Despite the fact that the distribution of the sample means is normal according to regions (One Way Anova, F Test = .734), education (One Way Anova, F test = .302), and gender (One Way Anova, F test = .618), it is nevertheless found that normality may not be accepted according to type of organisation (One Way Anova, F test = .001) and education (One Way Anova, F test = .042).

For instance, it is found that all tourism board presidents and 50% of the representatives of private sector associations believe that the importance of non-profit organisations may decrease if networks are set up in Portugal. Furthermore, whereas 80% of the members of the panel aged less than 44 do not see the importance of non-profit organisations to be damaged if they join a network, 57% of the respondents aged over 45 suggested precisely the opposite. In short, tourism board presidents, representatives of private sector organisations and individuals aged over 45 are amongst those who more strongly believe that the establishment of networks may damage the importance of non-profit organisations.

Although no special reason was found to explain why these three groups of members of the panel are more sensitive to the negative impact which networks may develop on non-profit organisations, it should, nevertheless, be taken into account, for the reasons discussed before (see section 4.5), that networks may indeed impact negatively on the already peripheral importance of non-profit organisations (see section 7.3.3). Therefore, it is important that some mechanisms are set up in order to ensure their representativeness within the administration, and avoid their pulverization by powerful organisations.

8.2.13 Globalization of markets

Although argued in literature that compared to manufacturing tourism products are unique and, thus, less subject to competition (Mill and Morrison, 1985), it is also widely known that in particular the 'sun-sea-sand' products which are offered by a number of Mediterranean countries (e.g., Portugal, Spain, Greece, Cyprus, etc) and by the Caribbean, show great level of similarity, the reason why many tourist flows move from one country to another according to, for instance, prices and currency rather than the characteristics of these destinations (see chapters 2, 5; and section 4.4).

Besides, due to increasing levels of mobility (e.g., fast and cheaper transports, better infrastructure and equipment, etc), there is nowadays a wider scope of options from which

tourists may choose, this situation being one of the reasons why the European world tourism share is declining rapidly, while some destinations in the Far East have seen their popularity increase (see section 2.4.1). Hence, tourist flows are increasingly becoming flexible and it is price and the luring capacity of a destination which most determines its attracting capacity.

Based on these considerations the tourism participants were asked whether networks of organisations would bring greater capacity for the tourism industry to face the challenges which have sprung from the globalization of the markets, in areas such as competitiveness, access to new markets, adaptation to new legal frameworks, adoption of new management styles, etc (see question 25, questionnaire I, Appendix II). The results show that 100% of the interviewees agree that networks may, indeed, make the tourism industry more adjusted to this new world, for the reasons introduced previously (e.g., higher cooperation, greater competitive capacity, closer cooperation and inter-organisational coordination, and greater exchange of information among organisations). No significant statistical variations are observed in the results as a result of the low dispersion of the answers.

8.2.14 Impact created by different viewpoints

Taking into account that networks are responsible for bringing together a wide spectrum of organisations and interests, the interviewees were asked whether that could lead to the establishment of richer and more informed policies, or whether the way by which decisions are taken would not change that much (question 26, questionnaire I, Appendix II). With respect to this 91.3% of the participants stated that the decision-making process would change significantly because policies would no longer be set up exclusively by the boards but, instead, in a horizontal way. In short, it is found, again, that tourism participants believe that networks may improve the 'procedural component' of planning activity (see section 6.2; figure 6.1).

Despite that, 4.3% of the interviewees argued that the decision-making process would not change that much because networks would always be dominated by a few prominent organisations, while small size and peripheral organisations would have little capacity for intervening in the whole process. With reference to this the example was again given of the little bargaining capacity of non-profit organisations, which, in a scenario of fierce competition, could even be eclipsed by powerful institutions (see also section 8.2.12).

8.2.15 Situations of conflict

Based on the same assumptions discussed in the previous section, the panel was again asked whether the direct involvement of a wide spectrum of empowered organisations could lead to disputes and conflicts which could end up in situations of conflict, and thus drive the administration to collapse (see question 27, questionnaire I, Appendix II).

With regard to this 76.7% of the respondents argued that, although leading to more intense struggles, conflicts would always be overcome, since situations of impasse would damage rather than benefit participants. The distribution of the sample means is normal according to region, type of organisation, age, gender and education, because there is low dispersion of values.

It should, nevertheless, be pointed out that 14% of the respondents suggested that some minorities could attempt to impose individual interests and, thus, block decisions; in spite of that, it was also said that the use of qualified majorities could be an effective way of avoiding situations of deadlock.

8.2.16 Organisations which would most benefit from the establishment of networks

It was seen in chapter 4 that the concept of network is associated with notions such as 'organisations which work together' towards common goals', 'voluntary transaction of resources', and 'cooperation to achieve success'. In addition to that, it was also seen that if they are to succeed networks ought to bring benefits to all members (see section 4.4).

In order to assess whether networks are capable of bringing benefits to the wide spectrum of organisations involved in the tourism sector, the interviewees were asked which organisations would most benefit if networks were established in Portugal (see question 29, questionnaire I, Appendix II). The results show that the vast majority of the members of the panel (84.4%) believe that networks would bring mutual benefits to both public and private sector organisations. The sampling distribution of the means is normal according to type of organisation (One Way Anova, F test = .307), region (One Way Anova, F test = .605), age (One Way Anova, F test = .718), education (One Way Anova, F test = .424), and gender (One Way Anova, F test = .477).

It is nevertheless observed that while 13.2% of the respondents stated that private sector organisations would benefit most from a network, 2.2% went further on this argument suggesting that these organisations would be the only beneficiaries of such organisational frameworks. The explanation of this outcome is linked to the fact that most private sector organisations have little power and influence within the administration (see sections 7.3.1, 7.3.5, and 7.3.9), and because under a network philosophy their importance and power would be substantially increased, then they are seen as the greatest beneficiaries of the potential establishment of networks.

8.2.17 How likely is the tourism organisation to evolve towards networks

A final question which the panel was asked was how likely is the tourism organisation to evolve towards networking schemes (question 28, questionnaire I, Appendix II). The results show that the vast majority of the tourism participants (85.4%) are convinced that organisational frameworks based on the network philosophy will soon or later be set up in the tourism sector for the reasons discussed before (i.e., networks provide a sound framework to bring together the diverse interests and organisations which are linked to tourism; they offer a credible alternative to the present boards; they may bring significant competitive advantages to destination-areas; they afford the establishment of more informed and accountable policies, etc). The consensus obtained from this question is so widespread that the sampling distribution of the means is normal according to type of organisation (One Way Anova, F test = .145), region (One Way Anova, F test = .745), age (One Way Anova, F test = .969), education (One Way Anova, F test = .774), and gender (One Way Anova, F test = .292).

Despite that, there is also a share of 12.2% of respondents who foresee such a scenario as unlikely to happen since, and according to them, it would be very difficult to bring together with the same objectives organisations whose strategies often rely on forms of fierce competition, individualism and even antagonism (for an expanded analysis of this argument see section 8.3.4).

8.3 Strengths and weaknesses of tourism networks

8.3.1 Introduction

In a similar way to that described in section 7.4 the panel was also asked to comment on the advantages and disadvantages which could emerge from the implementation of organisational

frameworks based on the network philosophy, in substitution of the present hierarchic and 'formal' approach followed by the Portuguese RTBs (see chapters 5 and 7). With regard to this two open-ended questions were placed at the end of the questionnaire, for the reasons introduced in section 6.6 (see Part IVb, questionnaire I, Appendix II); the information which was collected by these questions was viewed as anecdotal data and, therefore, was further grouped into mutually independent explanatory variables, according to the procedures suggested in the content analysis technique (see section 6.8.3). Later several quantitative measures were used to examine both the relative weight of each issue in the problems enumerated by the respondents as well as their dispersion within the sample.

As will be seen below, the information gathered by these two open-ended questions afford not only the examination of the strengths and weaknesses which can spring from the implementation of networks, but also to double-check (some of) the results described previously (section 8.2).

8.3.2 Strengths of tourism networks

When asked to enumerate what would be the most important benefits created by the establishment of networks in Portugal, in place of the present RTBs, the interviewees provided a total of 81 answers (nominations), which, after being split into mutually exclusive explanatory variables, represent 14 positive main strengths.

The most important advantage which would be produced from the establishment of networks is, according to 38% of the members of the panel (18 nominations), better horizontal coordination of policies. That is, in accordance with some findings discussed previously (see sections 7.3.12, 7.4.2, 7.4.3, 8.2.5, and 8.2.11) it is again argued that by giving an effective voice and empowering all participants, networks are able to strengthen the communication channels among organisations, to lead to stronger commitments, and, hence, to improve the inter-sector coordination of policies. This outcome shows normal distribution according to regions (Chi-Square = .867), type of organisation (Chi-Square = .675), age (Chi-Square = .825), gender (Chi-Square = .567) and education (Chi-Square = .528).

Furthermore, a share of 23% of the panel (11 nominations) stated that networks would lead to the establishment of better informed policies, since a larger number of participants would have an effective say in decisions which are taken within the tourism administration. This finding also affords double-checking of the results which were discussed in section 8.2.7, and helps to understand some of the criticism pointed at the way in which the Portuguese RTBs operate,

such as the centralization of decisions and lack of accountability of policies (see sections 7.3.1 and 7.3.7). This result also shows normal distribution according to regions (Chi-Square = .526), type of organisation (Chi-Square = .413), age (Chi-Square = .701), gender (Chi-Square = .674) and education (Chi-Square = .978).

The third main advantage which could emerge from the implementation of networks is, according to 19% of the respondents (9 nominations), better management of tourism resources. With reference to this, and in conformity with other findings discussed previously (see sections 7.3.4 and 8.2.5), it was again argued that since tourism boards have proved unable to have a full and clear picture of all the problems, and have also failed to bring together all participants, situations of mismanagement of resources are a reality which often undermine their operations. The potential contribution which could come from networks in this area is linked to the fact that, by giving an effective voice to all participants, networks would stimulate better utilization of resources.

It is interesting to observe that this subject assumes particular importance among participants included in small and medium size boards, the reason why the assumption of normality may not be accepted according to regions (Chi-Square = .001); this seems to suggest that the level of centralization of decisions is an issue particularly in small and medium size boards. For instance, whereas in the Algarve board no interviewee made reference to this issue, 67%, 47% and 35% of the members of the Costa do Estoril, the Alto Minho and the Rota da Luz boards respectively, suggested that networks could lead to better management of resources. No significant statistical variations are, however, observed according to age (Chi-Square = .952), gender (Chi-Square = .384), education (Chi-Square = .244), and type of organisation (Chi-Square = .683).

Three other main advantages which, according to 15% of the interviewees (7 nominations), could come out from the establishment of networks, are as follows. To start with, it was suggested that networks could bring more efficiency and effectiveness to the operation of the regional tourism administration (see also section 8.2.9). Furthermore, it is believed that they could bring a new dynamic into their functioning (for an expanded analysis see section 7.4.3). Lastly, it is argued that the establishment of networks may make regional tourism administration more powerful; increase its bargaining capacity; and make regional level organisations stronger for influencing national policies.

The improvement of the inter-organisational coordination of policies; the establishment of more efficient and effective policies; better management of resources; being more dynamic, efficient and effective in the way in which RTBs operate; and having greater capacity to intervene in

decisions taken by the national government, are the six main advantages which, according to the respondents, could be brought about from the establishment of networks. Although viewed as less important there are 11 other positive aspects which are believed would be brought about by networks.

For instance, 13% of the interviewees (6 nominations) argued that networks would also allow easier access to information available in other organisations, since they would stimulate tighter links among all participants (see also section 8.2.11). Yet, a share of 11% (5 nominations) suggested that the promotional activities carried out by the boards could become more efficient and effective, and, therefore, situations of mismanagement of resources, such as those described before (see sections 7.2.1 and 7.4.3), could be avoided or at least minimized. Furthermore 6% (3 nominations) said that most of the present disputes and conflicts which undermine the operations of the boards could vanish, since the communication channels established among all participants would be significantly improved (see also section 7.3.13). The same share of respondents also argued that networks would offer an adjusted organisational platform to prompt an active participation of all members engaged in the administration of tourism (see also section 7.4.3).

Also, 4% of the interviewees (2 nominations) believe that the establishment of networks could improve the image of tourism among other sectors as well as among public opinion, which, ultimately, could lead to a (desirable) comprehensive restructuring of tourism administration, not only at regional but also at national and local levels. Finally 2% (1 nomination) suggested that networks could bring more transparency and honesty into the functioning of tourism boards (see also section 7.4.3), while the same percentage of respondents argued that they could make regions better adjusted to the challenges which have sprung from world globalization and from the proliferation of supra national treaties such as the EU and GATT (see also section 8.2.13).

8.3.3 Weaknesses of tourism networks

When asked to point out problems which could emerge from the establishment of networks in Portugal the members of the panel provided 53 answers (nominations) in a total of 15 explanatory variables, which sharply contrasts with the number of positive features described in the previous section (81). That is, 1.53 advantages are mentioned to be created for each problem, which brings again evidence to the support which networks would find if they were implemented in Portugal.

The most important weakness which is pointed out at tourism networks by 32% of the interviewees (15 nominations), is related to the gap which might exist between the potential which is advocated in theory and the reality (the distribution of the sampling means is normal according to region (Chi-Square = .472), type of organisation (Chi-Square = .258), education (Chi-Square = .649), gender (Chi-Square = .957) and age (Chi-Square = .923)). To put it more simply, although not denying their theoretical importance it is suggested that networks could be difficult to put into practice as a result of the following.

To start with, they would imply stronger commitments and tighter relationships among all organisations, when, in practice, most of them follow isolated strategies. Although it has been seen before that the vast majority of the respondents would be willing to change their working styles and operating philosophies in order to become more compatible with other agencies (see section 8.2.2), it is nevertheless argued that this issue would be difficult to overcome. Furthermore, it is considered that because the implementation of networks would imply several transformations in the way in which organisations are run (e.g., working styles and operating philosophies; forms in which they interlock with each other; etc), the opposition of several participants to such changes should be expected, since organisations and people tend to become anchored in particular styles and routines which, once adopted, are not easily changed. Finally, despite it being considered by the vast majority of the respondents that an easier access to information would be an important advantage which could be brought about by networks (see section 8.2.11), it is also suggested that in a number of situations organisations are not willing to share information about their activities, since some material may, in some situations, bring them a competitive advantages over their competitors (see also section 8.2.10).

It is yet interesting to observe that when asked to comment on potential weaknesses and problems which could spring from the implementation of networks, 17% of the respondents (8 nominations) stated that no major difficulties whatsoever would come out from this type of organisation, since they would bring more benefits than problems. To put it in a different way, although not denying that some minor issues could emerge as a result of changes which would have necessarily to be introduced, such as in terms of working styles and operating philosophies, it is nevertheless argued that such changes would never lead to serious disputes and conflicts. The sampling distribution of the mean is normal according to regions (Chi-Square = .105), type of organisation (Chi-Square = .798), education (Chi-Square = .747), gender (Chi-Square = .434) and age (Chi-Square = .411).

The third main weakness which is attributed to networks, a criticism which is also extended to other classic forms of organisation, such as the bureaucratic model (for an expanded analysis see section 3.2), is related to the fact that, according to the panel, they would be incapable of

stopping the lobbying capacity exerted by some powerful groups. As far as this matter is concerned, 15% of respondents (7 nominations) stated that even based on an inclusive philosophy and on the empowerment of all organisations, networks would soon or later become undermined by power games, in which the authority would, ultimately, fall into the hands of powerful groups, such as large size organisations, government institutions, and local authorities. With regard to this, it was also argued that there are so many individual and corporate interests involved in the operations of regional tourism organisation, that it would be difficult, if not impossible, to give an effective voice to all participants, and in particular to less powerful groups, such as small private sector associations and non-profit agencies. The consensus found in this topic is so widespread that levels of normality may be accepted according to regions (Chi-Square = .534), type of organisation (Chi-Square = .768), education (Chi-Square = .785), gender (Chi-Square = .454), and age (Chi-Square = .220).

Another subject which is of particular concern for 11% of the respondents (5 nominations) is linked to the practical capacity of a network to deal with the multiple interests included in the tourism sector. That is, although not questioning the capacity of a network to create wide, and accountable, consensus (see sections 8.2.14 and 8.2.15), what is nevertheless argued is the fact that agreements might be reached through lengthy, and painful, discussions, which may delay policies and bother participants; in short, the outcome produced may not justify the process.

Furthermore, 9% of the respondents (4 nominations) believe that networks may prompt disputes and fuel the level of conflict among organisations, since participants will become exposed to direct confrontation; however, this finding strongly conflicts with the overwhelming opinion of the members of the panel discussed in section 8.2.15. In addition to that, 6% of the interviewees (3 nominations) argue that networks may complicate policies since, under a network philosophy, they must be comprehensive and result from compromises involving all participants.

Moreover, a very small share of 2% of the members of the panel (1 nomination) drew attention to the following problems. Firstly, networks could be more efficient and effective than the present boards if they were supported on larger budgets; however, what is widely known in Portugal is the fact that most boards operate with scarce resources and also that it is very difficult to increase their receipts (see section 7.2.1). Secondly, networks would bring more transparency into the functioning of tourism boards, which could be seen as a threat to some individual and corporate interests; therefore, their implementation could be faced with the opposition of these groups. Thirdly, networks could bring more bureaucracy into the functioning of regional tourism administration, since their effectiveness would depend on the

involvement of a larger number of participants in the decision-making and taking process. Yet, even under a network framework the influence exerted by political parties (see section 7.3.13) would soon or later become an issue again, since it is unlikely that they would be willing to release control over the RTBs. Also, the national government would not be very willing to allow the implementation of networks, since RTBs would become more powerful and, therefore, not so easily influenced and dominated by national organisations. This issue assumes particular importance when it is known that the Portuguese government follows an interventionist strategy in the tourism sector, principally in areas where tourism is viewed as a strategic sector among the other economic activities (e.g., the Algarve) (for an expanded analysis see section 7.3.7).

Furthermore, it is believed that networks would imply more comprehensive and inclusive national tourism policies, and, therefore, it must be thought that the restructuring of regional tourism organisation would demand profound changes in the way in which the national administration operates. That is, despite the fact that regional and national organisations operate in isolation from each other (see section 5.2.6), they should not be viewed as such because they are part of the same system. Moreover, it is argued that the efficiency and effectiveness of a network would depend on the availability of qualified personnel, when it is known that the vast majority of the staff working for tourism boards are not specialized in tourism (for an expanded analysis see section 7.2.1).

Finally, it is suggested that networks could damage the operations of private sector organisations, and also that they could lead to situations of impasse in the decision-making process. However these two findings conflict with the opinion of the vast majority of the respondents reported previously in sections 8.2.10, 8.2.14 and 8.2.15.

8.3.4 The possibility of implementing tourism networks in Portugal at regional level

It was seen before that the vast majority of the members of the panel believe that networks are capable of bringing a new dynamic into regional tourism organisation and form the basis of a better planned and more profitable tourism industry (see sections 8.2.1 to 8.2.17). For instance, when asked to comment on the way in which tourism administration is likely to evolve in the future, 85.4% of the respondents argued that tourism organisations are likely to move towards tighter levels of interconnection and commitment among agencies (the reasons which explain this answer may be found in sections 8.2.5 to 8.2.16 and 8.3.2).

However, when asked to answer, according to a five point scale (see question II.4, Part IV, questionnaire I, Appendix II), how easy/difficult would be the establishment of networks in Portugal, 64.3% of the respondents stated that they would be difficult to put into practice. Besides, while 52.4% said that tourism networks would be difficult to establish, 11.9% went even further along this statement and argued that they would be very difficult to set up. Conversely, 19% suggested that it would be moderately easy to convince organisations to join a network, whereas 16.7% argued that it would be quite easy to set them up in Portugal. The sampling distribution of the mean is normal according to type of organisation (One Way Anova, F test = .265), region (One Way Anova, F test = .396), age (One Way Anova, F test = .860), education (One Way Anova, F test = .462), and gender (One Way Anova, F test = .516).

There are three main reasons which explain why, despite being viewed as having great theoretical importance (see section 8.2), the implementation of networks may become a big issue. To begin with, since regional tourism organisation is anchored in many routines and is undermined by many individual and corporate interests, the introduction of changes into the present system could become an authentic nightmare. Furthermore, it is believed that networks would strongly conflict with the individualistic culture in which most organisations are run (see also section 8.3.3). Finally, and associated with the last argument, it is seen that there is an atmosphere of suspicion and skepticism about the kind of decision that would be taken by other partners. That is, despite the fact that 97.8% of the respondents would be willing to join a network (see section 8.2.1), many participants show deep uncertainty about what would be decided by their colleagues on this issue, a situation which adds evidence to the lack of communication and mutual mistrust that undermines the relationships established among tourism participants.

8.4 Conclusion

It was viewed in this chapter that most of the theoretical discussion about the potential offered by networks (see chapter 4), finds strong links to the problems faced by Portuguese regional tourism administration (see chapter 5 and 7).

While in previous chapters it was seen that issues such as world globalization (see section 3.3.3); neoliberalism (see section 3.3.1); the growing importance that region level administrations are assuming in the world (see section 3.3.5); the tendency towards the replacement of top-down approaches for horizontal ones (see section 3.3.6); the need for stronger levels of inter-organisational coordination of policies (see section 2.4); the necessity to make the planning process more participatory, informed, democratic and accountable (see

section 2.4); and the importance to reverse the present declining tendency of European tourism (see section 2.4); are assuming top priority in the planning, management and administration of organisations, what it is found now is the fact that tourism participants perceive that networks are forms of administration which offer the potential to face all these challenges.

In particular, tourism participants believe strongly that by moving decision centres downwards in the administration and by bringing together all organisations associated with the tourism sector, networks may lead to better management and allocation of resources (see section 8.2.8), and may prompt better inter-organisational coordination of policies (see section 8.2.11). As a result of these two advantages it is also believed that, when compared to the bureaucratic styles of administration which support the functioning of tourism boards (see chapter 7), networks lead to the establishment of more efficient and effective policies (see section 8.2.9); give regions more competitive capacity in the world tourism market (see section 8.2.5); make regions better prepared for the challenges which are brought about by the globalization of markets (see section 8.2.13); and make them better prepared for situations of recession in the markets (see section 8.2.6). From a planning point of view it is also believed passionately among tourism participants that networks lead to the establishment of better informed policies, since they are set up not by a handful of professionals, as they are at present (see sections 7.3.7 and 7.4.3), but, instead, by the direct involvement of a wide spectrum of professionals and skills (see section 8.2.7).

Since the network philosophy may be placed half way between markets and bureaucracies (see Thorelli, 1986 - section 4.3), and taking into account that with neo-liberalism market-led approaches have seen their importance increase very rapidly, it could be thought that the network philosophy would conflict somehow with market approaches. However, and in accordance with the theoretical arguments which are offered by specialized literature (see chapter 4), what is found here is the fact that networks offer an administrative structure which does not conflict with the market ideology (see section 8.2.10). On the contrary, what is believed among tourism participants is the fact that, by prompting tighter levels of inter-organisational coordination, networks lead, instead, to the improvement of the market functioning because it becomes more transparent (see sections 8.2.7 and 8.2.5).

Another important finding which is obtained from this chapter is related to the beneficiaries from the establishment of tourism networks. This issue assumes particular importance for tourism, since this sector involves a wide spectrum of organisations and interests, ranging from private to public sector organisations; government to non-government agencies; profitable to non-profitable organisations (see section 1.4). What is found is the fact that networks are perceived across the vast majority of tourism participants, independently of the nature of the

organisation, as organisational structures with the capacity to bring mutual benefits to all interests and groups involved in the tourism sector (see section 8.2.16). In addition to that, it is also found that the dynamic created by networks is unlikely to affect less powerful organisations, such as non-profit agencies, since their success depends on the achievements of each participant in the web (see sections 8.2.12 and 4.3).

Nonetheless, it should also be pointed out that there is evidence which shows that, in situations of fierce competition, less powerful organisations, such as non-profit agencies, may see their importance decrease (see section 4.5). With regard to this, what is recommended in specialized literature is the establishment of very clear procedures for the role of each member in the web when a network is set up, in order to avoid situations in which some partners are overtaken by stronger groups, such as economic interests (see chapter 4).

Again, and in spite of the fact that the evidence collected in Portugal shows that situations of conflict and impasse are unlikely to undermine the functioning of networks because they would end up as disadvantages for all members (see sections 8.2.14 and 8.2.15), particular attention should also be paid to this matter, since there is evidence which shows that it may become an issue in the functioning of networks (see chapter 4).

Finally, it is found that as a result of the characteristics and potential offered by networks, the vast majority of the members of Portuguese regional tourism organisation believe that networks offer a credible alternative for the way in which regional administration of tourism should move forward in the future (see section 8.2.17). This also explains the reason why the vast majority of them show great willingness to join tourism networks, if the government stimulates their establishment in Portugal (see sections 8.2.1 ad 8.2.2).

Chapter 9

Conclusion and Implications

9.1 Introduction

One of the central aims of this thesis has been to demonstrate that there is nowadays a strong need to start addressing the planning of tourism from a different perspective, since the type of approach undertaken in the past is no longer suited to the reality of the end of this millennium (see section 6.2). It was shown that the old economic paradigm fails to take into account the complexity of the problems produced by tourism, and, as a result of that, the tourism sector requires a new approach, or even a new paradigm, if it is to fulfill all its potential and develop without jeopardizing the supporting environment. The guidelines which result from important international tourism meetings, such as the Manila Conference and the George Washington Tourism Forum, and the policies which were put forward by highly representative international tourism institutions, such as the WTO, OECD, and United Nations, all point towards that direction (see section 2.4.2).

Based on this position this thesis provides an insight into the way in which tourism and town planning have evolved up to the mid-1990s, with the objective of evaluating the reasons which have prompted their progress; how the evolution of society has affected the way in which they evolved; the efficiency and effectiveness of the different planning paradigms which have dominated planning theory and practice in tackling the problems which planners have had to deal with; and, the way in which tourism planning theory and practice are likely to evolve in the future (chapter 2).

However, another central objective (see section 6.2) was to demonstrate that planners often attempt to improve the planning process only by looking at the way in which planning activity may be ameliorated, while little or even no attention is paid to the organisational framework in which it operates. In sharp contrast to this, what it is argued here is that the efficiency, effectiveness, and, generally speaking, the success of planning comprises the notions of improvement in the planning process (discussed in section 2.4) as well as in the organisational framework which supports planning activity (discussed in chapters 3 and 4).

What is proposed now in this chapter is to summarise and discuss some of the most important issues and findings which have resulted from the research (see section 6.2). Accordingly, section 9.2 presents the arguments which sustain the statement that the past planning approaches are not longer suited to the reality of the mid-1990s, while section 9.3 goes even further into this subject by suggesting ways in which planning activity may be improved in the future.

The present trend towards world globalization, the growing importance of regional level organisations, and the consequences which these have brought about in society through neoliberalism are discussed in section 9.4, with the aim of identifying some of the most important contours which ought to be considered in regard to the way in which administrations are set up in the future. Furthermore, in section 9.5 the advantages which the establishment of networks could bring into the tourism sector not only in terms of the planning process but also in terms of the profitability, competitive advantages and stability of the tourism industry are examined. Finally, section 9.6 discusses some of the most important implications of the findings obtained in this thesis to the situation of the Portuguese regional tourism administration.

9.2 Shortcomings of the tourism planning activity

One of the central objectives of this thesis has been to demonstrate that, unlike other sciences where the objective is to observe, describe, and explain (e.g., biology, chemistry, and physics), planning is a science, or an activity or even an art as some prefer to call it, whose purpose is to look for the best geographic, economic, social, and environmental organisation of the systems (see Webber, 1983, in Faludi, 1987 - section 2.3.1). Therefore, planning should be viewed as a volatile discipline in which theory and practice must not be addressed from a static point of view but, instead, as a dynamic body of knowledge whose evolution depends on stimulus emanated from society (see section 2.3.1).

The debate presented in chapter two provides clear evidence for that. For instance, in the aftermath of the Industrial Revolution town planning was included within the sphere of influence of architecture and civil engineering, since the paramount issues faced by society during this phase were linked to the expansion and redesigning of the infrastructure and equipment. Because most tourist developments launched during this period were of small size and not very complex, 'tourism planning' was seen as a discipline which did not require either a great amount of expertise or specialized skills. Therefore, tourism problems were addressed alongside other urban and regional planning problems, such as housing planning, water and power supply, accessibility, location of infrastructure and equipment, zoning, and protection of the natural environment (see section 2.2.2).

However, it was also demonstrated that although adjusted to deal with the tourism issues which emerged in the early days of the tourism development process, such a simplistic approach proved inadequate in tackling the problems produced by the tourism industry which developed during the 1960s. That is, while before the 1960s tourism was an activity characterized by the short distance movement of a small number of people, the phenomenon which emerged after the 1960s comprised the massive movement of people to regions away from their homes, often foreign countries, and the construction of extensive resorts. The figures speak for themselves: only between the 1950s and 1960s the world tourism arrivals increased by 556% (4,297% in Portugal) while receipts expanded sharply by 752% (1,572% in Portugal) (see sections 2.3.2 and 5.3.1).

It has been shown that the origin of the failure of the tourism development processes started during the 1960s and thereafter may be explained by the incapacity demonstrated by planners to develop adequate forms of planning capable of tackling the impact produced by the modern tourism industry developed after the 1960s. That is, despite the profound changes operated in the tourism sector, tourism planning continued to be viewed within the framework set up for the simplistic forms of development launched after the Industrial Revolution. As a result of that, many of the tourism developments which have mushroomed worldwide have been responsible for having changed, often dramatically, the pace of life and the spatial, social and economic organisation of a number of areas of high tourism potential (see section 2.3.2).

Some of the most important arguments suggested in this thesis to explain why tourism planning has failed to deliver sustained and symbiotic forms of development may be summed up as follows. First and foremost, although a 'holistic perspective' affords simplified approaches of the tourism phenomenon, by drawing the attention to the paramount issues which influence directly the operation of the tourism industry, governments and academics must not overlook the fact that the tourism sector is, above all, the product of the interaction of a number of

interconnected activities, ranging from businesses (economics) to the environment, planning, culture, and society; in short, if tourism is to succeed it has also to be regarded from an 'organic point of view' (see the discussion centred on figure 1.1).

Secondly, linked to the first point, despite its economic importance (e.g., impact on the balance-of-payments, income, employment, investment and development), tourism cannot be considered exclusively from an economic angle, since its commercial success depends on several 'priceless' goods, such as the quality of the natural, social and cultural environments; moreover, there are situations where they are the most important luring factors which prompt the attraction of tourist flows (over 93% in Portugal - see figure 5.7). However, in accordance with information offered by specialized literature (see section 2.3.2), evidence collected in Portugal shows that the 'natural' evolution of the tourism sector follows a short-term economic rationale, while these 'non-profit' areas are only brought into the core of the decisions when negative impact becomes visible and some market segments start abandoning the area (see sections 7.2.1, 7.3.1, 7.3.3 and 7.3.14).

Thirdly, the tourism sector comprises a wide spectrum of interests and organisations (see section 1.4). If all these interests are not carefully taken into account in the planning of the tourism sector it is unlikely that the tourism industry will develop all its potential and governments will also be unable to take full advantage of all the economic benefits which may be produced by the tourism industry. In addition to the verification of this, presented in a large amount of specialized literature (see section 2.3.2), the evidence collected in Portugal also shows that when tourism policies are set up by, and for a few participants, the planning of the tourism sector becomes undermined by conflicts among agencies (see sections 7.3.7 and 7.3.13), and policies emerge ill-designed since they lack participation (see section 7.3.7), accountability (see section 7.3.7 and 7.2.2), and representativeness (see sections 7.3.4 and 7.2.2).

With regard to this, it was also shown that the supply-side definitions proposed by Smith and the WTO (see Smith, 1988, and WTO, 1994b - section 1.4) provide a breakthrough towards understanding what tourism is all about, since they afford an explanation of the core and periphery of the tourism sector. However, based on evidence collected in Portugal it is also shown that these definitions often overlook the fact that the tourism industry is a variable which depends on the stage of tourism development and forms of tourism. That is, the tourism industry varies from region to region, and, thus, average coefficients explaining what the contributions of each sector for the tourism industry are may overshadow regional variations which must be carefully considered in the planning of the tourism sector (see sections 7.3.3 and 7.3.14).

Finally, although it has become common sense to argue that tourism comprises private sector organisations and, therefore, public sector actions should be restricted to a minimum (the guidelines set up by the Portuguese government are good a example of that - see MCT, 1991), evidence brought about by this thesis disputes this argument, for the following three main reasons. To start with, the market-led styles which dominated the planning approaches of previous decades, and in particular during the 1960s and 1970s, proved unable to cope with the full extent of the problems which are produced by the tourism sector (see section 2.3.2). Furthermore, the evidence collected in Portugal shows that all organisations, including private sector agencies, place great emphasis on the role developed by public sector organisations in the coordination and development of the tourism sector (see sections 7.3.14). Also, the evidence produced from Portugal shows, contrary to many myths, that in developing countries the tourism development process is often guided by public sector institutions rather than by private sector organisations (see section 7.3.14).

These four arguments help to show that one of the main causes which has contributed to the failure of the tourism planning activity relies on the incapacity demonstrated by planners to adapt to the new realities which have emerged over the last three decades. That is, despite the new dimension of the tourism industry launched after the 1960s and the magnitude of the impact produced by the tourism development process, most projects, principally during the 1960s and 1970s, continued to be viewed from the perspective of the simplistic physical strategies put forward after the Industrial Revolution, set up to support the expansion of tourism but without interfering with the action instigated by private sector organisations. To put it in a different way, planners failed to take into account that planning must be viewed as a volatile discipline which has to change according to the evolution of society. This also serves to explain why growing numbers of academics state that in future planners and governments must *move proactively rather than in response to various pressures as they arise* (see conclusions from the George Washington Tourism Policy Forum in section 2.4.2).

In addition to the incapacity of tourism planning to adapt to the new circumstances created by the tourism industry, this thesis has also demonstrated that some of the reasons which have contributed to the failure of tourism planning may also be found in the way in which planning, as a science, evolved in the past. For instance, it was shown that tourism planning has been strongly neglected among other issues in urban and regional planning, since planners show more interest in other broader problems, such as zoning, environmental quality, design and location of the infrastructure and equipment, rather than in tourism issues. This also explains why Jafari found only 7 PhDs focussing on tourism planning, carried out from an urban and regional planning point of view, between 1951-87 (see Jafari, 1990 - section 2.3.2). Also,

there is useful evidence presented from Portugal which supports the argument that tourism planning is strongly neglected among other urban and regional planning issues, since only a few (36%) of the municipalities are represented in the regional tourism boards by their presidents, while the remaining 64% are represented by vice-presidents (see table 6.2.a and section 7.4.3). This is a situation which is explained by the fact that, firstly, many of them are still concerned with other major problems, such as water supply, sewage treatment plants, and environmental quality, tourism being, thus, a lesser priority area; secondly, despite the economic importance of tourism there is still little awareness of the tourism problems among politicians and the public (see section 7.4.3); thirdly, as a result of the poor reputation of tourism (tourism is still viewed as the 'Mickey Mouse industry') and of the lack of professionalism (see section 7.2.7), it is still believed that tourism problems may be dealt by anyone, i.e. there is no need for specialization in the field.

The lack of importance of tourism planning as compared to other urban and regional problems is also to be noticed from the small number of courses in tourism planning set up as a specialisation in urban and regional planning (see Inskip, 1988 - section 2.3.2). The case of Portugal is good example of that since, despite the scale and impact produced by the tourism industry (see chapter 5), the first degree in tourism planning and management was only launched in 1988 in the University of Aveiro (Central Portugal).

Furthermore, it is found that, despite close proximity and interconnection between tourism and town planning, both disciplines have progressed showing inexplicable misunderstandings and distance between them, even though their theory, practice, methods, and achievements are closely linked, and dependent, on each other (see chapter 2).

It is based on these, and other, arguments that the statement 'the planning profession knows little about leisure while the leisure profession knows very little about planning' has found strong support among academics (see Torkildsen, 1992 - section 2.3.2).

This thesis has also demonstrated that in spite of it being often argued in literature that in many situations it is difficult to set up planning strategies because governments are mostly concerned with the economic benefits which are produced by tourism rather than with its planning and development, the reason why an enthusiastic economic approach ('advocacy platform') dominated tourism planning theory and practice in the past (see Jafari, 1990; and sections 1.4 and 2.3.2), evidence which is debated in this thesis does not help to support that assertion. For instance, it was shown how sensitive the Portuguese government was with regard to the negative impact which unplanned forms of development could produce in the Algarve; the

reason why a vast plan was set up in the region in its early stages of development (1960s) (see section 5.3.1).

Furthermore, the lack of interest of governments in tourism may, again, not be used as an excuse for the poor involvement of planners in the tourism sector, since most governments have always placed great emphasis on tourism, as is documented by the comprehensive organisational structures which were set up in a number of countries, and by the high status, with often a ministerial position, assumed by the sector among other national departments (see section 3.2.6 and in particular figure 3.2). With regard to this it is shown in section 3.2.6 that the planning of the tourism sector has been placed among the top priorities of many national governments, even when improvement of the economic benefits produced by the tourism industry is viewed as their top priority.

Moreover, the report published by the WTO in 1980, about the situation of tourism planning up to 1980 (WTO, 1980), does not deny that many countries launched important planning initiatives to control the mushrooming tourism developments of the 1960s and 1970s. Instead, what the WTO publication is particularly critical about is the fact that half of the plans set up during this period showed several serious deficiencies, the reason why they either were never put into practice, or failed to lead anywhere (see WTO, 1980 - section 2.3.2).

These arguments are not presented in this thesis with the objective of suggesting that the planning of tourism has been characterized by few and poor achievements, when evidence, also presented here, points towards the opposite. To put it in a different way, what is criticized here is the tardy, slow and inadequate way in which planners tend to face the evolution of tourism, since most of their styles show them to be reactive rather than proactive.

The evolution of tourism planning theory is very clear on this matter. For instance, it was shown that one of the most important and pioneer shifts introduced into tourism planning theory came from academics with a background in economics (e.g., Archer, Thuens, Gray, Peters, Henderson, Vaugan, Fletcher, Wanhill, Wall and Knapper), and not from urban and regional planners who specialised in the tourism field. Economists realized during the 1970s and 1980s that the profitability of projects should no longer be viewed from the short-term angle which had dominated their approaches during the 1960s and 1970s, but, instead, from a long-term perspective and the way in which projects were linked to other economic activities (see section 2.3.2).

In particular, economists were responsible for introducing into the field some important concepts which radically changed tourism theory and practice during the 1970s and 1980s,

such as the 'multiplier effect', 'long-term economic sustainability' and the 'economic impact of projects at regional and national levels'. They also shifted the emphasis of tourism planning theory and practice from the narrow and short-term economic view of the system towards a more embracing one, which comprises notions such as 'sustainability', 'comprehensive planning', and 'inter-organisational view of the system'.

In second place, in spite of the recommendations which arise from the 1980 WTO report (WTO, 1980), suggesting that tourism planning should evolve towards more comprehensive approaches, what was observed in practice was the fact that research and literature in areas such as 'nature' and 'society' were still in their infancy, since little attention had been paid to them by planners. For instance, research and literature drawing on the social implications of tourism only started to be published during the 1970s by academics such as Doxey (1975), Cohen (1972), and De Kadt (1979), and later in the 1980s by Mathieson and Wall, Young, Jafari, Turner, Ash, Bryden, Greenwood and Jud. As far as the environmental implications of tourism are concerned the situation was no different, since systematic research started to be published in the area only from the 1980s (see section 2.3.2).

The narrow economic approach which prevailed in the tourism field up to that time as well as the lack of research in areas covering environmental and social issues, provides a good explanation for the reason why Cooper et al (1994, Unit 2.2), commenting on the situation of tourism and hospitality education in the mid-1990s, argue that although 'the study of tourism proper' offers advantages over other models, such as 'tourism as an application' and 'vocational training for tourism', this approach is, nevertheless, faced with the problem of the lack of *enough quality material* (p. 108). The need to develop tourism education and launch the basis of a richer and more professional sector is, though, among the cornerstones of the future tourism, as is notably pointed out by the WTO: *the success of tourism in the 21st century is to eliminate amateurism at all levels through well-designed education and training programmes, and the implementation of a sound system of professional standards* (WTO, 1994a, p. 78).

In third place, it was shown that the publication of the first models in tourism planning theory started to take place only during the 1980s. In particular, the PASOLP approach, developed by Baud-Bovy and Lawson in 1982 (see figure 2.7), and the systematic model, created by Getz in 1986 (see figure 2.8), constitute two important achievements which pushed tourism planning theory away from the excessive short-term economic dominance of previous decades, towards a broader, and also more balanced, view of the systems. Thereafter, tourism planning started to be seen from a comprehensive point of view, comprising notions linked to short and long-term economic profitability which are matched against the environmental and social characteristics of each place.

Nevertheless, what is criticized in this thesis is the bizarre way in which some models that had already proved inadequate in urban and regional planning were brought into tourism planning. For instance, although it may be argued that Getz's model (figure 2.8) was set up with the aim of addressing matters linked to physical planning and, therefore, it may not be compared directly with forms of (more strategic) planning put forward, for instance, by Baud-Bovy and Lawson (figure 2.7), Mill and Morrison (figure 2.11) and Edgell (figure 2.14), it is nevertheless found, by a direct comparison between figure 2.8 (Getz's model) and figure 2.3 (Chadwick's model), that the model proposed by Getz in 1986 follows closely the philosophy which was used in the rational systematic approach created by Chadwick in 1971, and which was abandoned in urban and regional planning during the 1970s as a result of its inapplicability to the reality and the wrong premises on which it was based (see section 2.3.1).

Such a situation brings again support to the argument that tourism planning has evolved disassociated from its town planning counterpart, when it has a lot to benefit from it, since its theory and practice show a level of scientific discussion, empirical validation and, generally speaking, maturation which may help tourism planners find the best way of putting planning theory and practice forward. In addition to that, it should be thought that tourism and urban and regional planning, being sides of the same coin, have a lot to gain from each other (see section 2.3.2).

Apart from the above, this thesis has shown that the scope of interests and range of disciplines involved in the tourism sector is so wide that its evolution ought to take place with tight links to other areas, such as urban and regional planning, geography, sociology, political science, economy, etc (see section 1.4). This is the reason why many academics argue that, tourism being a meeting point and a discussion ground of several disciplines, tourism education and knowledge will most benefit if all these subjects are brought into the core of the teaching programmes (see Cooper et al 1994; Jafari and Ritchie, 1981; CNAA, 1993). Despite that, it is also demonstrated that there is a long way to go in this area since there are countries, such as Portugal, where tourism education is still viewed by the official institutions responsible for tourism education as synonymous with hotel management (see sections 5.3.2.5.2 and 7.2.7).

Another area which is identified in this thesis as being responsible for the inadequacy of many planning styles is the organisational framework in which planners and tourism organisations operate. It has been shown that the bureaucratic model developed by Max Weber for the society that emerged in the post-war period, led to the development of ideas such as the separation of power and responsibilities among members of an organisation; the allocation of the decision-

making process to a few core professionals; and task specialization and rigorous isolation of departments (see section 3.2; figure 3.1).

In the planning field such a philosophy found a parallel on the 'rational' and 'scientific' principles which sustained planning theory and practice during the rational planning phase, such as the belief that solutions could be found only by professionals because they had the right expertise to tackle problems; and also that public participation and the involvement of groups of interest should be banned from the planning process since, by being rational and scientific, planning was a neutral activity and, therefore, all groups and interests would automatically be taken into account in the decision-making process (see sections 2.3 and 3.2.3).

However, what is demonstrated is the fact that there is a world of difference between these theoretical arguments and the reality. While the professionals who work for the tourism boards believe they set up the 'best' and 'most adjusted' policies and strategies to develop their regions, most participants find them poor and neither accountable to the organisations linked to the sector nor representative of their interests. Conversely, such policies are regarded as providing a partial view of the system as well as favouring particular groups and interests (see sections 7.3.7 and 7.4.3).

The evidence which was collected in Portugal also shows that the attempt which is still made by many Portuguese planners in designing policies within this 'rational' and 'scientific' framework, has led planning away from several national laws related to principles such as representativeness, democracy, and legitimacy, the reason why the Portuguese planning activity is, to a certain extent, embodied in illegality (see section 5.2.2). This situation is particularly serious since, though not exclusive to Portugal (see section 2.3), the planning of tourism is carried out by non-accountable organisations (see section 7.2.1), which means that public money is used to set up policies which favour particular groups and not the wide range of interests linked to the sector (see section 7.3.4).

9.3 Ways of improving tourism planning in the future

The previous section helped to identify some of the most relevant areas which contributed to the failure of tourism planning in the past. Therefore, one of the most important steps which ought to be taken in the future is to overcome such deficiencies.

In particular, the quality of tourism planning in the future will depend on the level of maturation of tourism planning theory and practice, since that is an area which substantially influences the

quality and adequacy of the planning activity. Although not denying that important steps were undertaken in the past (see chapter 2) what is also argued is that tourism planning needs more research in areas such as the economic, social and environmental impact of tourism; the quality and adequacy of past planning experiences; the role that tourism should assume at the national, regional and local levels; and the organisational framework in which planning should be carried out (see further sections). For instance, even in countries, such as Portugal, where the past planning experiences may provide important lessons about the way in which tourism planning should be put forward in the future, research continues on a disappointing scale (see the literature review presented in section 5.3.1 and Lewis and Williams, 1991, p. 107).

It is also strongly believed that the quality of tourism planning involves the need to create a new relationship between town and tourism planners, since both have a lot to learn and benefit from each other, even if in the past their evolution was characterized by mutual misunderstandings and lack of communication (see section 2.3.1). This issue assumes particular importance when it is increasingly argued that tourism planning demands more urban and regional planners specializing in tourism and more professionals with a background in tourism specializing in urban and regional planning. That may also be viewed as a good strategy for stressing the importance of tourism planning among other town planning problems; for increasing the sensitivity of governments to the contribution which tourism planners may provide in the delivery of better adjusted development processes and more profitable forms of tourism; and for expanding the demand of professional specialists in this area.

Despite the importance of all these areas what is also strongly believed is the fact that the improvement of tourism planning cannot be seen only in terms of the planning activity; on the contrary, it ought to be viewed together with broader problems which affect (negatively) the tourism sector. It has been demonstrated that despite its economic importance tourism is still faced with general problems associated with the low level of maturity of tourism education and lack of recognition among governments. The situation observed in Portugal is a good example of that since, despite its economic importance (see section 5.3.2.4), the government is still looking for clear ways of tackling tourism problems. Hence, the planning and development of tourism has been characterised by steps forward and backwards; the failure to review the National Tourism Plan being a good example of that (see section 5.3.2.7).

Also, Portuguese tourism education remains in its infancy as a result of the lack of quality material affording the establishment of courses in the study of tourism proper, and of academics with expertise in tourism (see also section 9.2). As a result of this, the tourism sector in Portugal has been dominated by professionals with no background in the field, while the (few)

courses specializing in tourism are still seen by many both as 'bizarre' and 'funny' (see sections 5.3.2.5.2, 7.2.1, 7.2.7 and 7.4.3).

In other words, academics should not expect the importance of tourism to increase rapidly without resolving some basic issues which are still dividing them, such as what tourism and the tourism organisation is all about (see section 1.4 and chapter 3); and how to tackle the problems produced by the tourism industry (see chapter 2). In other words, only by developing tourism knowledge and by eliminating amateurism at all levels may tourism, and thus tourism planning, evolve successfully in the future (see WTO, 1994a, p. 78).

In addition to these problems, which are not exclusive to tourism planning but are related to broader issues, it is also found that, if tourism planning is to succeed in the future significant improvements must also be introduced in the way in which the planning process is carried out. That is, since planning is not a static science but instead a body of knowledge whose purpose is to change whatever it is confronted with, the reason why it is often labelled as an 'artificial science' (see Simon, 1969 - section 1.6), new ways have to be invented of promoting it because society has changed profoundly during the 1980s and 1990s and, thus, the rational planning styles set up in previous decades are no longer applicable to the new reality.

It is shown that some of the most important events which occurred in the past, and which will influence the way in which planning will be undertaken in the future, are linked to several consequences of the first major oil crisis of the early 1970s. Some of these are the shift operated in the economy from industry towards services; the reduction of the role of the state; the reluctance of the public to accept the growing decline in the quality of services delivered by publicly owned institutions and organisations in areas such as urban and regional planning, health, housing, power and water supply, transportation, and so forth; the potential brought about by the progress in information technology; and the substitution of top-down approaches by forms of corporate and strategic planning (see chapter 3).

It was seen that the philosophy which emerged after the 1980s is rooted in the belief that, unlike central planned decisions, markets are more efficient in the delivery of quality products and services to customers, since, by being closer to them, they may more rapidly and effectively react to their stimulus (demands), and lead to better allocation and rational use of resources. In the face of bureaucratic and inefficient administrations, and suffocated by growing national debts, many states have decided, since the 1980s, to move to the hands of the private sector many formerly publicly owned companies ('privatization' - see section 3.3.2), and, replace the former dominant paradigm of the welfare state philosophy (see section 3.3.1) by market-led or neo-liberal orientations (see section 3.3).

It is a matter of fact that in the early days of neo-liberalism, which reached its peak in America, with Ronald Reagan, and in the UK, with Lady Thatcher, the role, importance, and contents of planning were systematically criticized and profoundly attacked by many right wing politicians (often tagged as the 'champions of the market' as a result of their excessive confidence in market-oriented approaches), who strongly, and also blindly, believed in the 'automatism' of markets to cope with all problems with which markets and society have to deal (see section 2.4.1). As a result of these attacks, launched alongside the implementation of many purely market-led policies, there were a number of academics who argued that there was no longer a place for planning and, hence, it was time to write its obituary (Ambrose, 1986); that neo-liberalism had brought about a profound dismantling of the planning system (Ravetz, 1986); and also that many planning courses, including tourism planning, should start to look for a new rationale and identity among disciplines such as management and business (Harris, 1994).

However, what this thesis shows is that such arguments were wrong, since there is growing awareness and recognition that, although offering great potential and efficiency in the short-term delivery and management of a number of products and services, markets are, nevertheless, blind to long-term profitability and sustainability, indirect economic benefits which spill over from their functioning (usually associated with the notions of 'externality' and 'economic multiplier'), and to dealing with 'public' and 'priceless' products (see section 3.2.5). Hence, the theory of market failure has gained, since the late 1980s, renewed breath among a number of followers of Keynes and Schumpeter, who have started to publish literature replacing, and readjusting, the theory of market failure to the new framework created by neoliberalism (e.g., Galbraith, 1992; Thirlwall, 1989).

For instance, based on an extensive literature review it is demonstrated that, as a result of the incapacity shown by market-led approaches to tackle many problems which markets and society have to deal with, some British governments have decided to complement market ideology with policies which used to be identified with the state interventionist philosophy of previous decades (see section 2.4.1). The implementation of regional planning and policy guidance, such as in the tourism field (PPG 21 - see DoE, 1992); the need to pass legislation capable of controlling serious situations of pollution resulting from the operations of private sector companies; the attempt to avoid the shortcomings brought about by the markets into the housing market and in some deregulated transport lines; and the loss of a global strategy in the newly privatized utilities; are among the areas which are receiving, or have already received, special attention from right wing British governments.

As far as tourism is concerned this thesis also produces evidence which disputes the idea that markets can tackle all problems, and, therefore, planning is an activity which is becoming obsolete. For instance, it has been shown that one of the great problems with which tourism was faced up to the 1980s was linked to the fact that the dominant economic approach used by planners at this time failed to address areas not linked to short-term profit, such as the environment, society and long-term economic profit, the reason why many tourist destinations of high potential were jeopardized, and this approach had to be abandoned (see section 2.3.2).

Based on the Portuguese situation it is also shown that there is growing recognition across all tourism participants involved in the Portuguese regional tourism organisation, belonging to private and public sector organisations, that the development of tourism at the regional level ought to be driven by, in the Portuguese case, a public sector agency responsible for bringing into the core of the decisions not only economic interests but also matters linked to the environment, culture, urban and regional planning. For instance, it has been demonstrated that Portuguese tourism boards are viewed unanimously among all organisations as the most prominent and important partners in the regional tourism administration (see sections 7.3.3, 7.3.9, 7.3.14 and 7.4.2). Furthermore, when asked to elect the organisation which in future should be responsible for the regional tourism organisation, about 80% of the tourism participants suggested, again, that tourism should be coordinated and supervised by a public sector agency with similar characteristics, though with a different operating philosophy (see section 9.5), to the present boards (see section 8.2.3).

Moreover, the thesis also offers evidence which proves the 'natural tendency' of most organisations to pay attention to planning and environmental matters only when tourism starts impinging on the natural ecosystem and society (see sections 7.3.3 and 7.3.14). In other words, non profit areas are not considered relevant to the operation of private sector organisations, unless the quantity, quality, intensity and magnitude of the impact produced by them start to negatively affect their profitability. This evidence also helps to support some of the premises of Miossec's model (Miossec, 1977), when he argues that only in the later stages of tourism development governments realize how important planning and environmental matters are, and, thus, implicitly suggest that this is a situation which should be sought from the very beginning if tourism is to succeed; the supporting environment is to be preserved; and balanced development processes are to be achieved.

This thesis has yet shown that the decline of the radical economic discourse which dominated the 1980s is also a reality which may also be observed from the U-turns operated in policies set up in several countries. The fall of the Republicans in America; the declining popularity of the British Conservatives in the first half of the 1990s; the overthrow of the Portuguese neo-liberal

government in the 1995 elections as a result of its excessive economic speech; and the growing opposition to the evolution of the EU only towards a common economic market, are good examples of that.

However, what is also argued is that the new circumstances created by neo-liberalism demand profound rethinking of planning theory and practice. That is, planners should not confuse the actual growing importance (or revival?) of planning with steps backwards towards the rational approach that dominated planning activity up to the 1970s, for the following reasons. First of all, because the theory and practice which supported the rational paradigm showed several critical shortcomings both in terms of the theoretical assumptions on which it was founded as well as in terms of its capacity to tackle practical situations (see section 2.3). In second place, because rational planning emerged within socio-economic and political conditions (phase of the 'welfare state') which no longer exist.

It was then based on these assumptions that this thesis looked for some of the paramount issues which will dominate planning theory and practice in the future, which, as pointed out in section 6.2, is another central research objective of this thesis. Based on empirical evidence collected in Portugal and on an extensive literature review which covers matters linked not only to planning and tourism but also economy, organisational behaviour, politics, administration, sociology, psychology, geography and information technology, it was then possible to detect some critical areas which ought to be brought into the core of planning activity in the future in order to increase its adequacy to the new world reality and make it more effective and efficient.

A first main conclusion which is offered by the thesis in this domain is linked to the conviction that planners must abandon the idea that solutions may be found within the 'scientific' principles of the 1960s and 1970s, and accept the fact that there is a great political component in the decisions they have to take, since they have to be found in accordance with each situation and place, such as availability of human and economic resources, political and administrative organisation, and level of social and economic development (see section 2.4). In practical terms this means that planning has to be definitely assumed as a meeting point and a discussion ground of several groups of interest and disciplines; that it should be done with people and not for people; and also that it should be viewed as a dynamic and creative activity rather than the product of a set of 'package steps' ('survey-analysis-plan') which lead to the design of 'blueprints' (see Healey, 1990; Forester, 1989; Choy, 1991; Gunn, 1994; Healey, 1990 - section 2.4).

However, this does not mean that planners should not look for 'rational' approaches, since 'rationality' helps to find the best solution for problems; help to make responsible political

decisions; and results in learning (see Faludi, 1987 - section 2.3.1). To put it more simply, what is argued here is that solutions cannot be viewed as an end in themselves but the result of knowledge and technical expertise which are matched against the circumstances of each place. This is the most important aspect which distinguishes the past rational approaches and the styles of rationality which ought to be set up in the future.

In addition to that, planners must also realize that the idea that policies can be designed exclusively by professionals is a concept which emerged in the post-war period when there were a few people with expertise in particular areas and, therefore, organisations and institutions were structured from a top-down perspective, in which the ultimate power was allocated in the hands of a few professionals (or bureaucrats) (see section 3.2). However, as a result of the improvement of the standard of education and the growing willingness of people to become active players in the decisions which planners have to take, planning must evolve towards more inclusive styles (see sections 2.4 and 3.3.1).

Despite this tendency being one of the cornerstones of the successful planning forms which ought to be put forward in the field, what this thesis also shows, based on evidence collected in Portugal, is that in the vast majority of situations decisions are still in the hands of a few professionals who believe passionately that they have the right expertise to find the best solutions for the problems. The structure of the Portuguese regional tourism administration (see section 5.3.2.5.3) and the planning styles which are followed by the Portuguese planners (see section 5.2.2) are good examples of that: tourism boards comprise an executive commission, supported by a group of professionals, which is responsible for taking all decisions. Linked to the board there is a regional tourism commission which includes a number of participants involved in the sector, but whose ultimate responsibility is to endorse policies set up by the board of directors. However, what is also found is the fact that there is growing opposition to this situation, since tourism participants show strong willingness to become active members rather than spectators of the decision-making and taking process (see sections 7.3.7, 7.3.4).

The second main conclusion brought about by this thesis in this domain is related to the fact that planners must put an end into the isolation which separates them from private sector operators. That is, the success of planning will increasingly depend on the extent to which public and private sector organisations coordinate their activities.

It is a matter of fact that this thesis has offered evidence which illustrates that some important steps have already been undertaken in this field. For instance, particular attention has been paid to the emergence of 'arm-length organisations', in the local tourism organisation (see section 3.2.6), and to other forms of 'partnership schemes' set up not only in the tourism field but also

in other areas (see section 2.4), and has concluded that they represent important achievements in the new relationship which ought to be established between these two past 'rivals'. In spite of that, what is also argued is that this new relationship must proceed further in the future, since it cannot be circumscribed by strategies put forward to make policies feasible and to speed up the development process, but must, instead, be extended to the decision-making process.

The advantage of proceeding along that way seems obvious. Firstly, policies may be designed according to the capacity of investment available in each place. Secondly, plans and policies may become easier to implement, and, as a result of this, situations like the ones reported by the WTO (WTO, 1980), in which half of the plans established up to the 1980s were not implemented, are less likely to happen (see section 2.3.2). Finally, plans and policies may become richer and more accountable with the introduction of a private sector perspective in a field which is only viewed from a public sector point of view.

However, more evidence is provided, which shows that there is still a long way to go in this area, since, despite being viewed as strategically important for tourism (see section 7.3.14), the vast majority of private sector operators have little connection within the regional tourism organisation (see sections 7.3.1 and 7.3.5); which makes them among the most peripheral participants in the administration of tourism (see section 7.3.3) as well as among other national and local organisations (see section 5.3.2.6).

Similarly, the thesis paid particular attention to the role which non-profit organisations may play in the tourism field. It has been concluded that if tourism is to succeed it has to be designed according to the natural, social and cultural characteristics of each place; i.e. it has to be viewed from a comprehensive and sustained point of view (see section 2.3.2). However, what is also found, based on the Portuguese situation, is the fact that there is a world of difference between what is argued in theory and what is put into practice, for the following reasons. To start with, although defining explicitly which public and private sector organisations are to be represented in the regional tourism administration, governments do not apply the same principle to environmental, social, and cultural agencies (see section 5.3.2.6). Also, whenever tourism boards have to decide which organisations are to be included in the administration, in the vast majority of the situations priority is given to the representatives of government departments and private sector organisations, whereas little or even no attention is paid to non-profit organisations (see sections 5.3.2.5 and 5.3.2.6).

Furthermore, it has also been demonstrated that the successful planning styles which ought to be undertaken in the future must take into account the need to make planning a more pragmatic activity. With regard to this, it has been shown that as states have reduced their sphere of

influence in society, their receipts have also decreased ('fiscal crisis'), which means that, due to economic restrictions, policies have to be set up within shorter budgets and periods of time.

One of the major implications of this situation to the planning activity is linked to the fact that planners have to prioritise procedural planning styles in detriment to the (lengthy, time and money consuming) substantive ones undertaken in previous decades (see section 2.4). The strengthening of the relationships between planners and other groups involved in the planning process is viewed in this thesis as the best way of putting this new style forward, since, by cooperating more closely with other partners, planners may have easier access to information; use the expertise provided by other agencies; speed-up plan preparation; and cut costs.

Notwithstanding, what the Portuguese situation illustrates, again, is the fact that there is a long way to go in this area, since policies are still being designed within the tourism boards headquarters, and with, therefore, few links to other members of the administration. However, what is also shown is the fact that, in doing so, tourism boards have to spend massive amounts of money to support the costs of administration and to pay salaries (see section 7.2.1), and also that, in spite of those efforts, most policies have shown poor quality (see section 7.4.3); have failed to tackle with efficiency and effectiveness the problems which are faced by the members of the administration (see sections 7.3.4 and 7.4.3); have led to situations of profound disenchantment with the present styles of administration (see section 7.4.4); and, hence, have originated the fragmentation of regional tourism organisation (see section 7.3.4).

The two last variables that will influence the way in which planning is to be carried out in the future, and for which the planning process also needs to be readjusted, are the globalization of the world and the progress achieved in information technology. The following sections will, however, provide an expanded analysis of these two topics while discussing their influence on the way in which organisations should restructure their operations.

9.4 Organisational framework in which the planning activity is carried out

The two previous sections (sections 9.2 and 9.3) helped to elucidate three central research objectives of this thesis (see section 6.2): firstly, why many of the planning styles of the past proved inadequate to tackle the problems which are produced by tourism; secondly, why such styles are no longer adjusted to the reality of the end of this millennium; and, thirdly, critical areas which ought to be rethought in planning theory and practice in order to make them more efficient, effective, and adjusted to the new world reality.

However, a second main argument which is brought about by this thesis is that, although underestimated by many planners, planning activity cannot be viewed only in terms of its 'procedural component' (discussed in the previous sections), because the 'administrative component' in which it is undertaken strongly influences its efficacy and effectiveness (see section 6.2). Besides, there are situations in which the improvement of the planning process does not lead to effective and efficient forms of planning, because this depends on organisational rather than procedural issues. For this reason one of the central arguments of this thesis is linked to the conviction that the improvement of planning activity comprises improvement not only in the 'procedural' but also in the 'administrative' component of planning activity (see section 6.2). This also helps to explain why this thesis attempts to bridge the (incomprehensible) gap which exists between 'planning' and 'organisations' (chapter 2), and, bearing that in mind, looks for suitable organisational structures capable of supporting the delivery of effective and efficient forms of planning (chapters 3 and 4).

It was demonstrated that after the Industrial Revolution, and in particular in the post-war period, socio-economic development was associated with manufacturing, large size corporations (including multinationals), and the production of massive numbers of standardized products (see section 3.2.1). Taking into account that the hierarchical model created by Max Weber based on hierarchy, discipline, authority, and informality, afforded the potential to coordinate large numbers of employees, it was adopted both by manufacturing and public sector institutions (see sections 3.2.1 and 3.2.2).

Nonetheless, what is found nowadays is that the bureaucratic model is becoming obsolete, since it was set up for the society which emerged in the post-war period. That is, as a result of several events which took place over the last two decades, such as the first major oil crisis of the early 1970s, the expansion of neo-liberalism, the improvement of the standard of education, the improvement of the standard of living (associated with growing amounts of disposable income), society has evolved from an economic structure based on manufacturing, large size corporations, massive production of similar products, standardized forms of production, and vertical organisation of production (see sections 3.2.1 and 3.2.2), towards small size organisations, services, flexibility, creativity, and full utilization of resources (see section 3.3.1).

The origin of these changes may be traced to several profound socio-economic, political and technological transformations which have occurred over the last two decades. For instance, with the end of the cold war, trade capacity has sublimated other traditional forms of power, such as army potential. As a result of this, many countries have diverted attention from army

agreements, such as NATO and Warsaw Treaty, towards the creation of trade blocks, such as the EU, NAFTA, and MERCOSUL (see section 3.3.3).

Moreover, several events which occurred during the 1970s and beyond led governments to rethink the way in which they intervene in society. With several oil crises, increasing national debts, the growing decline in the quality of the products and services delivered by bureaucratic and inefficient public sector organisations, and pressure from citizens frustrated by the excessive interventionist role of the state, the low quality of public goods and services, and high taxation, many governments decided to give a new orientation to their macro-policies.

Influenced by the right wing policies of Ronald Reagan, in America, and Mrs Thatcher, in Britain; by the growing economic pressure of the 'Asian Tigers'; and the creation of a large area of 'free' economic trade in Europe (EEC), the ideology of the state as the provider of goods and services has been gradually replaced by the ideology of the market, of the free competition, and of the individuals. As a result of that a large number of state-owned companies were, or have been, transferred to the hands of the private sector ('privatization' - see section 3.3.2). That is, from the idea of the 'welfare state' and 'safety net' provided by governments 'indistinctly' to all population, the world is evolving towards notions such as individualism, competition, and economic rationality. In short, the philosophy of the welfare state is giving place to the rationale of the market ('neo-liberalism') (see sections 3.3.1 and 3.3.2).

What is demonstrated in this thesis is the fact that these world megatrends have been responsible for profound socio-economic and political changes, and also that organisations, governments, and, in this case, the planning activity, must capture these new orientations if they are to succeed. For instance, as a result of the end of the cold-war and of fierce competition, policies set up by growing numbers of private sector corporations, public sector institutions and non-profit agencies, are becoming less influenced by strategies designed by central governments; on the contrary, strategies are becoming influenced by targets set up within each organisation, and by objectives which do not follow the administrative boundaries of the nation-state but the world scale ('world globalization' - see section 3.3.3).

The present trend towards the world globalization has also been boosted by two other variables. To start with, with the improvement of the accessibility among different areas, as a result of the technological advances in aviation, in the motorway networks, and the expansion of the TGV/Eurostar network, the issue of the geographic distance is being overcome, the reason why the notion of geographic distance is becoming obsolete and is giving place to concepts such as time and cost distance (see Spiekermann and Wegener, 1994 - section 3.3.3).

Furthermore, the advances in information technology (e.g., electronic mail, image transmission devices, computer-assisted decision-aiding technologies, and on-line management information systems) have also contributed to the approximation of different areas in the world; to the dispersion of the economic activity; to the end of the principle of the 'advantage of agglomeration' (since companies need no longer be geographically concentrated in the same area); to the creation of small size organisations (instead of large size corporations); to an easier communication among different hierarchical levels within organisations; and to the full utilization of resources (both goods and manpower) (see section 3.3.4).

The implications of these megatrends to the spatial, social, economic, and political organisation of the systems have also been enormous. For instance, the old-fashion notion of homogeneous areas operating as spaces which complement each other is being replaced by the concept of sustained regions whose web of relationships spills over to other countries (see section 3.3.5).

Also, the image of the national government working as the stimulator of innovation and progress, according to a top-down perspective, is being replaced by the idea that development is created in 'self-sustained' regions which offer the capacity to compete with other areas located not only within their countries but also in other parts of the world (see sections 3.2.4 and 3.3.5). This also explains the reason why growing numbers of academics and practitioners argue that more attention should be paid to the peculiarity of each place and region, instead of looking only at general figures, such as national GDP, employment, disposable income, and so on, which often provide a distorted, and blind, image of a country as well as of its potentialities (see Ohame, 1995; Osborne and Gaebler, 1992; Rifkin, 1991).

The growing importance of regional level organisations to the social, economic and political organisation of the systems is documented in this thesis by several examples. For instance, nowadays the Catalonia region is becoming closer to the centre of Europe than to other Spanish areas such as the Galicia and the Andaluzia; the EUREGIO, and the looming of relationships between the northern part of Portugal and the Galicia are also other good examples of that (see section 3.3.5).

Yet, the comparison between England's South East and North East is becoming difficult to understand only within the English borders, since the situation in the South East shows closer proximity to other developed European areas than to its Northern counterparts. In the same way the case of the Portuguese coastal areas and the interior regions, or the North and South of Italy, could be mentioned. The present trend towards the establishment of regional assemblies in Portugal and in England is also a good example.

The strategic importance attributed to regions may also be observed from the way in which the EU is evolving. The 'subsidiarity principle' was passed with the objective of giving power and greater levels of autonomy to local level organisations, since it is believed that they are closer to markets and people, and, therefore, may more rapidly and efficiently react to external stimulus; perceive what the best investment priorities are; and allocate and manage more efficiently resources available within their jurisdictions. The growing number of supra-national projects covering areas such as education (e.g., ERASMUS programme), planning and development (e.g., LEADER groups - rural development; RECITE - Regions and cities of Europe), are also good examples of the present trend in Europe to boost transnational relationships and to stimulate countries to look for affinities not only within their own frontiers but instead in a borderless perspective.

The implications of these megatrends in the structure and operation of organisations is also enormous, since they have been driven away from the concept created by Max Weber of formal, vertical and pyramidal structures, responsible for rigorous, inflexible, disciplined and formal division of labour (see section 3.2.1; and figure 3.1), towards the notion of horizontality, informality and closer connection among all clusters of the system (see section 3.3.6; and figure 3.3). However, it was also shown that 'horizontality' does not imply only that decisions centres are moved downwards in the administration, or that closer proximity should be set up among all clusters included in the same system. The idea of horizontality goes beyond these two notions, since it demands new ways of thinking; of managing people and resources; of viewing the surrounding environment; of making the most of the resources available and avoiding routine and indolence; and of being creative and innovative and leaving behind obsolete concepts such as seniority and red-tape (see sections 3.3.5 and 3.3.6).

Since private sector organisations are amongst the agencies under most pressure to look for the best and most efficient forms of production and organisation capable of ensuring them more profit and, thus, their economic survival, it was easy to offer in this thesis several successful examples of how many of them have replaced their old-fashioned top-down structures by horizontal ones. It was also possible to conclude, based on evidence provided by specialized literature, that horizontality brings about important advantages, such as better utilization of resources (because decisions are not designed by a few core bureaucrats but instead by a universe of skillful employees); more creativity; less 'red-tape' and feelings of alienation and estrangement among the staff; more motivation and job satisfaction; higher performance and productivity. Such advantages are particularly important since it has been demonstrated that success in this new world is associated with 'mission-driven' rather than 'rule-driven' organisations (see section 3.3.6).

However, what is also shown in this thesis is the fact that the pace of change in public sector organisations is much slower than in private sector organisations, since government-run institutions are not so intensively pressurized by economic targets, and their operation is based on procedures which may be identified with the old-fashioned top-down styles, such as informality, seniority, and insulation among departments (see section 3.3.1). In spite of that, what is found, based both on research conducted in Portugal and on an extensive literature review, is the fact that such old-fashion procedures are outdated and unable to deal with the new reality, and in particular with the new planning styles which ought to be undertaken in the future (see section 9.3), and, therefore, radical changes are needed (see section 3.3.8).

The situation of Portuguese regional tourism administration is a good example of that, since it shows particularly well how the bureaucratic style which supports the operation of tourism boards is unable to answer with efficacy problems which emerge within their regions, and to deliver effective forms of planning. The thesis shows that 'formality' and 'insulation' between tourism boards and tourism participants, even if they are represented near the boards by regional commissions (see section 5.3.2.5.3), has brought about profound changes of attitude to the quality, efficiency and effectiveness of the regional tourism administration.

For instance, bureaucracy (see section 7.4.3), formality (see section 7.3.7) and low levels of interaction between tourism boards and participants (see sections 7.3.1, 7.3.2 and 7.3.5), are identified as leading to the following main problems: (i) misunderstandings and conflicts among agencies (which are blamed for undermining the operation of tourism organisation) (see section 7.3.13); (ii) tourism boards become exposed to the influence and control of external interests, such as political parties (see section 7.3.13); (iii) low levels of inter-organisational coordination of policies (see section 7.3.12); (iv) fragmentation of the administration (see section 7.3.4); (v) tourism boards are run by a handful of powerful organisations instead of being driven by all organisations and interests involved in the sector (see section 7.3.3); (vi) policies set up by the boards are shown to be poor, unaccountable, ineffective and inefficient (see section 7.4.3); (vii) tourism boards have become small size organisations which deal with small budgets and are excessively dependent on the national government; (viii) and, finally, the operations of tourism boards resemble small size but highly bureaucratic organisations incapable of tackling with efficiency and effectiveness the tourism development processes within their regions (see section 7.4.3).

Moreover, nowadays the trend is for regions to set up links with other national and foreign areas in order to improve their access to knowledge; to avoid duplication; to increase the inter-sector coordination of policies; to exchange expertise and information; and to cut costs ('globalization'). However, what is seen among the Portuguese RTBs is that their bureaucratic

styles lead them to operate in isolation from other areas (see section 7.4.3). This is a situation which may be observed from the low spending on information technology, capable of making RTBs closer to other tourism participants and to other areas (see section 7.2.1).

Taking also into account that the Portuguese RTBs are still excessively attached to national government (see section 7.2.1), then it may also be understood that the old fashioned concept of central government working as coordinator and stimulator of development and innovation, according a top-down perspective, still prevails in the operation of the Portuguese regional tourism administration. In short, the Portuguese tourism boards are still guided by obsolete 'rule-driven' rather than 'mission-driven' styles, the reason why they are accused of low efficacy and effectiveness, and also the reason why most tourism participants manifest profound disenchantment and frustration with their operation and, thus, assess them with a mark which is below the minimum acceptable level (2.98 out of 6 - see section 7.4.4).

However, this evidence does not serve to say either that there is no place for regional level organisations in the tourism field or, when they exist, their role and importance should be restricted to their minimum. Conversely, there is strong and unequivocal evidence which points in the opposite direction. For instance, first of all, many negative impacts produced by tourism have their origin in unplanned forms of development, the case of the projects launched during the 1960s and 1970s being good examples of that (see section 2.3.2). Secondly, many negative impacts produced by tourism result from the excessive interest which is put by governments into the attraction of large numbers of visitors into their countries, while, simultaneously, neglecting the impact produced by them on destination areas (see sections 2.3.2 and 2.4.2).

Furthermore, the lack of specific agencies responsible for the coordination of tourism prevents countries from maximizing economic benefits which are not properly taken into account by private sector organisations, such as indirect and induced impacts (see section 3.2.5). Also, the 'natural' tendency of tourism is to evolve according to an economic rationale, while neglecting non-profitable areas, such as the environment and society (see sections 7.2.1, 7.3.1, and 7.3.3). Yet, the tourism sector includes a wide spectrum of organisations which demand some sort of coordination among them (see section 1.4). In addition, the development trend which is seen worldwide points towards the increasing importance of regional level organisations (see section 3.3.5).

Moreover, tourism is a regional phenomenon since tourist flows are directed to particular regions (e.g., the Algarve, the Costa del Sol, Madeira, the Canaria islands, etc), the reason why planners argue that regional administration offers the right platform to tackle many of the issues which emerge from its operation, such as transportation; zoning of equipment and

infrastructure; environmental and social protection and enhancement; the definition of carrying capacity levels; the creation of itineraries, etc (see Inskeep, 1991, 1994; Gunn, 1994).

In addition to all this, the need for some sort of coordination and liaison among regional tourism organisations is not either another theoretical concept or a new fashion offered by specialized literature, but is instead a need which may be observed from the way in which organisations operate. It is found that beyond the 'legal' and 'formal' tourism administration which was set up by the Portuguese government (see section 5.3.2.5.3), there is in practice an informal network of relationships responsible for binding, with major or minor intensity, tourism participants to each other.

For instance, although it has been proved that the links established among the organisations associated with the tourism sector at regional level are neither intense nor frequent (see sections 7.3.1 and 7.3.5), it is also found that organisations contact each other because the efficacy and effectiveness of their operations demand the exchange of information (see section 7.3.6); some sort of coordination of strategies (see section 7.3.12); and mutual contacts (see sections 7.3.8 and 7.3.7). In addition to that, it is also demonstrated that an informal network of relationships would always exist even in the absence of official boards (see section 7.3.2).

Taking into account that tourism at regional level demands some sort of coordination, and also that the present structure offered by tourism boards is neither adjusted to the present reality nor provide the right framework for tourism to succeed, then what is argued in this thesis is that the formal and bureaucratic philosophy which supports the operation of tourism boards should be replaced by more effective and efficient forms of administration.

With regard to this what is argued is that the network philosophy, which has been applied successfully to other areas, may make a useful contribution to the field, for the following reasons: firstly, because it emphasises the need to address the development process from a regional point of view; secondly, because it supports the idea that the organisation of the development process should be viewed from a horizontal rather than from a top-down perspective; finally, because it offers room enough to accommodate not only the wide range of organisations included in the tourism sector but also the improvements which ought to be brought into the planning process (see section 9.3). These assumptions are also the core of the research objectives proposed in this thesis (see section 6.2), and for which an expanded analysis is provided in the following section in order to examine whether they may be accepted or not.

9.5 The potential contribution of networks to the improvement of the regional tourism organisation

Networks are defined in this thesis as organisational structures whose philosophy may be placed between Weber's bureaucratic model and the market approach. Their objective is to strengthen cooperation among partners involved in the same business, through the exchange of products, services, information and expertise. They seek to cut costs, to increase the transparency of the market and to make the web more competitive in relation to other areas. That is, the concept of network is rooted in the belief that since the success of every organisation depends on some elements of its task environment, and, hence, on the achievements of other partners in the web, the activities of an organisation should not be looked at only within its legal borders but also in a broader perspective such as other organisations that direct or indirectly influence its operations.

This thesis has also shown that the advantages which may be produced by networks are not only theoretical ones, since there is evidence which shows that the premises on which the network theory is supported are valid when applied to businesses and non-profit institutions. The case of the regeneration of the textile industry in Central Italy; the Japanese 'keiretsu'; the establishment of networks in the telecommunications field, high-tec industry, central banks and other financial groups; and several cases of non-profit networks covering areas such as human delivery services, universities and other educational consortia, health-care centres, labour-management relationships, and human delivery services; are good examples of how successful networks are emerging, or have already emerged, worldwide and how they may bring about significant benefits to the operation of a number of organisations and institutions (see sections 4.3 to 4.6, and section 6.4).

It has also been demonstrated that important steps have already been undertaken in the planning field towards the establishment of networks. For instance, it was shown that strategic alliances, involving private and public sector organisations (e.g., partnership schemes and arms-length organisations), are a reality which may be found linked to the new planning concept which is emerging worldwide (see section 4.3).

However, what is also shown is the fact that, in the vast majority of the situations, such strategic alliances are sought by planners only to enhance plan implementation and accelerate development, and also that they often include only private and public sector organisations, while little, or even no attention is paid to non-profit agencies. In sharp contrast to this, what is argued is that such a philosophy must be extended to the decision-making process, and also that it ought to be supported by a wider scope of interests, including non-profit ones.

The application of the network philosophy during decision-making stages may lead planners to design policies through the involvement of all participants linked directly or indirectly to the planning process, and, therefore, orient it towards more inclusive and comprehensive planning styles. In doing so, networks may also afford the introduction into planning of some of the critical changes which ought to be operated in the planning process, such as the need to abandon the rational principles which supported planning practice of previous decades; the need to break up the insulation between planning and private sector organisations; the need to replace substantive planning styles for procedural ones; the need to make planning process and policy more pragmatic, participatory, informed, strategic and adjusted to the new global vision of the world; and the necessity to bring plan design and implementation strategy together (see section 9.3). In short, networks offer not only the potential to bring more horizontality into the functioning of planning activity but also the potential to put into practice the changes which ought to be introduced into the planning process.

Furthermore, this thesis has demonstrated that networks may offer two other great advantages when applied to the planning of the tourism sector. First of all, it was seen that efficient and effective forms of tourism planning may only be achieved if the wide scope of interests and the wide range of organisations involved in the tourism industry are brought into the core of the decision-making process (see sections 1.4 and 5.3.2.5.3). The failed planning experiments of the 1960s and 1970s were shown as example of the consequences which are produced by tourism when its planning is carried out on the basis of a narrow area of considerations (see section 2.3.2). With regard to this, the network philosophy may bring important input into tourism planning, since its theory and practice comprise the notion that policies must be designed by the direct involvement of all participants (see chapter 4).

Secondly, it was shown that the European world tourism share is decreasing very rapidly, since, despite growing numbers of arrivals, Europe has lost 5.43% of the world tourism market between 1980 and 1993, while other destinations have strengthened their position in the world market; for instance the East Asia / Pacific region registered an increase of 6.21% in its share of the world market during the same period (see figure 2.14).

In addition to this problem, it was shown that as a result of fierce, and often predatory, competition, growing numbers of private sector operators have to face strong competition, coming not only from their most direct competitors, located within the region where they operate, but also from foreign countries with the capacity to supply similar products (the 'sun-sea-sand' products offered by Mediterranean countries being good example of that) (see section 4.4). Often, such competition is so unbearable for operators that important implications start to

emerge not only in the tourism industry but also in the destination areas. For instance, forms of fierce competition are responsible for reducing the profitability of investment; for bringing about market instability; for impacting negatively on the quality of the products supplied by operators; for producing negative impacts on the environment, society and culture; and for reducing the quality of the experience gained by tourists during the sojourn in their destinations (see sections 2.3.2 and 5.3.2.4).

With regard to such situations, what networks offer tourism participants is an alternative framework in which the micro view of the system, that supports market-oriented styles, is replaced by a macro one, where competition is seen on a world scale rather than in a localized perspective. Network theory is supported by three main economic theories: the 'non-zero sum game', the 'prisoner's dilemma' and the 'tit-for-tat strategy' (see section 4.4). From the point of view of the tourism sector they mean that participants may obtain more benefits if they cooperate with each other, instead of becoming involved in forms of predatory competition, since cooperation lead to the creation of stronger, more balanced and competitive regions capable of attracting larger number of tourists; of making destinations more competitive in relation to other areas; and, hence, of bringing benefits to all organisations located within the region (see section 4.4).

Viewed from the angle of each country network theory means that tourism participants in regions such as the Algarve, will obtain more benefits if they cooperate with each other and create competitive advantages over other direct competitors, such as the South of Spain, the South of France, Italy, and Greece. Furthermore, seen from the perspective of the EU the theory means that closer forms of cooperation and common policies comprising these 'rival' areas should be set up in order to tackle the declining tendency of tourism in Europe and, thus, to make it more competitive in the world tourism market.

Since the concept of network is new when applied to tourism, research was carried out in Portugal with the objective of evaluating whether its theory and practice are adaptable, and thus may be applied, to the tourism sector. Taking into account the characteristics of the Portuguese private sector industry, made of small size units (see sections 7.2.1, 7.2.3 and 7.2.4), often involved in intense competition, and, therefore, where cooperation schemes are unfamiliar and unusual situations (see section 7.4), it may be said that the results are extremely surprising.

The first and most important finding is the fact that the vast majority of tourism participants find network theory of great importance and actuality when applied to tourism, the reason why tourism organisation is seen as being very likely to evolve in the future towards this type of framework (see section 8.2.17). Furthermore, when asked whether they would be willing to

join a network, 98% of tourism participants, which means almost all organisations including private, public, non-profit, government and non-government agencies, answered straightaway 'yes' (see section 8.2.1). This great awareness of the potential offered by networks to tourism is to be seen from the fact that all participants demonstrate strong willingness to change their operating philosophies and working styles with the objective of becoming more compatible with their local colleagues, and, thus, of becoming eligible to embark on this new organisational style (see section 8.2.2).

This thesis also provides evidence that the theoretical advantages which are presented in network literature, and which have already been validated by the feed-back produced by the practice of a number of organisations which have already adopted this philosophy in areas such as business and non-profit activities (see above), are also echoed by the organisations associated with tourism. For instance, tourism participants perceive that networks would strength destination areas, since they would become more competitive (see section 8.2.5); with stronger capacity and ability to face situations of crisis and instability in the markets (see section 8.2.6); and would help them to become better adjusted to the new challenges which are brought about by world globalization (see section 8.2.13).

Nevertheless, a powerful argument which could be used against networks is related to the fact that they could, somehow, affect the functioning of markets, when the neo-liberal tendency which emerged during the 1980s has brought about renewed strengths to market-led orientations, and such a trend is likely to dominate economic theory and practice in the foreseeable future (see section 3.3). However, what this thesis also shows is that networks are not incompatible with the market rationale (see section 8.2.10). On the contrary, they are seen with potential to improve its functioning, since they may bring more transparency into its operations (see section 8.2.11), and prompt better management and allocation of resources (see section 8.2.8).

Viewed from a planning point of view, the empirical evidence collected in Portugal also shows that most tourism participants identify networks with organisational frameworks which may significantly improve the way in which the planning and development of tourism is undertaken at regional level. Networks are seen as having the potential to capture the new planning trends which are emerging worldwide, and which specialized literature recommends should be introduced into planning theory and practice (see section 2.4); as well as having the potential to overcome the shortcomings which undermine the bureaucratic, formal and top-down approaches followed by most tourism boards (see section 3.2).

For instance, it is strongly agreed by the members of Portuguese regional tourism organisation that by bringing together all participants into the decision-making and taking process, the planning and development of tourism is improved in the sense that policies become better informed, more participatory, more accountable and more inclusive, since they are set up with input provided by many, differentiated, specialized agencies, professionals and skills, instead of being set up by the few professionals who work for the boards (see section 8.2.7).

In addition to that, it is also strongly believed that policies may also become more efficient and effective, because they can include a broader spectrum of situations (comprehensive planning) and can be set up in accordance with the availability of resources, manpower and financing capacity of each place (effective planning). Such results also suggest implicitly that planning may become more pragmatic; undertaken according to procedural rather than substantive planning styles; and based on close relationships between public and private sector organisations, government and non-government organisations, which constitute some of the cornerstones of the successful planning forms which ought to be set up in the future (see section 9.3).

As far as the network potential is concerned, two other important findings are also brought about by the research conducted in Portugal. First of all, it is found that, although comprising a wide spectrum of organisations and interests, conflicting situations may not become a big issue in the operation of networks, since it is believed that such situations would damage all participants (see sections 8.2.14 and 8.2.15). Nonetheless, it is also found that this issue must be accepted as a sensitive matter, and, hence, particular attention is recommended to be taken with it whenever a network is set up, in order to avoid undesirable situations of impasse.

Secondly, although considered irrelevant by the vast majority of the Portuguese tourism participants (see section 8.2.12), there is evidence that in the face of fierce competition non-profit organisations may be overtaken by other participants (see section 4.5), which means that, and again, special attention should be paid to this issue whenever a network is set up. The establishment of agreements on the role of each participant in the network may be seen as a useful strategy capable of avoiding situations of control of the network by a few organisations.

A final chief finding which is brought about by this thesis is linked to the potential difficulties which may occur in setting up this new organisational framework among public sector organisations and in particular in the tourism field. That is, despite total support and full appreciation of their potential, two tiers of tourism participants believe that networks would be difficult to establish in Portugal, while the other tier does not foresee major obstacles preventing them from being set up (see section 8.3.4).

The major difficulty which could prevent the establishment of networks is linked to the fact that they would represent a great challenge to the present 'status quo' and to the bureaucratic way in which tourism boards are run. To put it in a different way, networks would imply vast changes in the tourism organisation and demand active participation of all members, and that can be seen as a big issue since they would demand a U-turn in the way in which participants are used to work. The second main issue which could prevent the establishment of networks is that they would bring more transparency into the functioning of tourism boards, and, therefore, they would challenge particular groups, interests and people.

The third main factor which is found could prevent networks from being set up is the indolent philosophy which supports the operation of public sector organisations. That is, while it is easier to introduce changes into private sector organisations, provided that they lead to more profit, public sector organisations are non-profit institutions where the quality of the final results is more difficult to perceive.

Finally, despite the widespread agreement on the improvement which networks may bring to regional tourism organisation, it is found that their establishment depends on the awareness and political will of governments to guide tourism administration in that direction; on the bargaining and persuasive capacity of planners and managers to put across the validity of the arguments which support network theory and practice; and on the ability of tourism board presidents to convince tourism participants of the advantages which may result from networks.

9.6 Implications for Portugal

After having discussed some of the most important contributions of this thesis to the field, now it seems important to sum up the findings which were obtained specifically about Portugal, and discuss their implications for the way in which the Portuguese tourism administration should evolve in the future, which, as pointed out in the methodology chapter (see section 6.2) represent another central research objective proposed in this thesis. However, since the debate presented previously includes several remarks about Portugal, the discussion which follows should be seen alongside the comments made in the above sections.

It is a matter of fact that the evolution of tourism in Portugal has been characterized by great achievements: the number of international arrivals has increased steadily since the 1950s, nowadays representing over 8 million of tourists and over 20 million visitors (see figures 5.1, 5.3 and 5.4); with an average annual growth of 10.45%, Portugal shows the fastest rate of

tourism growth among the 12 EU countries (see table 5.2). The impact of tourism on the economy is also very significant since the tourism sector accounts for 4.8% of the GDP, which is the largest impact among the 12 EU countries (see table 2.3), and, despite its small size, Portugal is already the world's eighteenth largest tourism earner (see table 5.2).

Several policies put forward in the past also serve to show the emphasis placed by the government on the tourism sector. For instance, tourism is represented at the national level by a Ministry and a Secretary of State, which are the top positions that may be reached from any department within the Portuguese administration (see sections 3.2.6 and 5.3.2.5.2). As a result of the impact of tourism on the economy the government also decided to launch a National Tourism Plan between 1986-89, and, subsequently, a set of policies in areas such as planning, development, zoning, diversification of products, marketing and promotion, which aim at attracting more tourists and improving the quality of tourism products (see section 5.3.2.7).

However, despite all these remarkable achievements it is found that many things are still to be done. For instance, despite the (theoretical?) emphasis placed by the government on the expansion of domestic tourism (see section 5.3.2.7), less than 50% of the Portuguese population spend holidays, and only a few 4.6% can afford to do it abroad (see figures 5.12 and 5.14). Although action launched in the tourism field may facilitate the expansion of domestic tourism, the Portuguese government must be aware that this issue cannot be tackled only within the sphere of the tourism sector, since economic factors, and in particular disposable income, are among the key factors which most determine the expansion of domestic tourism (see figures 1.1, 2.1 and section 2.2.2). This means that action put forward by the government only in the tourism sector may achieve poor results and lack efficacy if they are not horizontally integrated with strategies launched by other departments.

Furthermore, despite the policies put forward by the government in the National Tourism Plan, tourism is still too concentrated in some periods of the year ('seasonality' - see figures 5.7 and 5.17) and in some particular geographic locations (i.e., in the coastal areas - see figures 5.19 and 5.20), the excessive dependence on the 'sun-sea-sand' and 'holidays' markets being the main cause of that (see figures 5.6 and 5.18).

Also, despite the growing number of arrivals in Portugal, the economic evolution of the tourism industry has not been so favourable as it may be thought. For instance, the average length of stay of international tourists fell by 34% between 1979 and 1994 (see figure 5.23); yet, the receipts generated by tourism have dropped in real terms; that is, while the number of arrivals expanded by 27% between 1987 and 1992, the receipts decreased by 3% for the same period (see figure 5.4); last but not least, despite the massive number of tourist arrivals during the peak

season the average spending per bednight is very low (about £7 in August - see figure 5.25 and section 5.3.2.4).

An important reason which explains why, despite the growing numbers of arrivals, the expansion of tourism in Portugal has been characterized by several bad indicators (e.g., poor economic results per tourist; spatial concentration of flows; and social and environmental impacts - see chapter 5), is related to policies which have been put forward by the government in terms of the administration of the tourism sector. That is, despite the emphasis placed on the attraction of growing numbers of international tourists, the government has failed to set up an effective regional tourism administration capable of maximizing the economic benefits which may be produced by tourists during their stay, and of stimulating forms of symbiotic development between the tourism sector and the destination areas. Despite all the socio-economic and political changes which occurred in the world and in Portugal, the Portuguese regional tourism organisation dates from the 1930s and 1950s.

This issue assumes particular relevance when it has been demonstrated that the importance of effective regional organisations in the tourism sector is enormous (see sections 2.4, 3.2.5, 3.2.6 and 3.2.7). To start with, tourism is, above all, a regional phenomenon since tourist flows are directed to particular regions. Also, regional level organisations offer the right platform to tackle several critical issues faced by the tourism industry, such as, planning, development, carrying capacity, social protection, environmental enhancement, improvement of indirect and induced economic impacts, and design of tourist itineraries. Furthermore, regional boards offer the potential to put forward the improvements which ought to be introduced into the planning process, such as the need for more pragmatic approaches, and accountable, participatory, and representative policies. Furthermore, there are several funding schemes provided by Brussels under the subsidiarity principle, the access to which depends on the quality of the regional tourism organisation. Last, but not least, this thesis provides evidence which shows that one of the most important megatrends worldwide is towards the increasing importance of regional level organisations.

It is a matter of fact that the Portuguese government has already passed important responsibilities to tourism boards in order to take advantage of their potential and to follow the worldwide trends discussed before (see section 5.3.2.5.3). However, what is also found is that there is a wide rift between what is stated by legislation, the goodwill of the national government and the reality.

Indeed, it is found that there is at present a profound state of disenchantment among tourism participants about the way in which tourism boards are run in Portugal, the reason why they are

assessed with a mark of 2.98, which is below the minimum acceptable level (3.00) (see section 7.4.4). There are two main groups of reasons which explain this present state of frustration with the regional tourism administration: the first is linked to the way in which tourism boards are set up in Portugal, and the second is associated with the way in which they operate.

As far as the legislative framework is concerned it is found that the flexibility provided by legislation has the advantage, by not being compulsory, of allowing only those areas (municipalities) really interested in promoting and developing tourism, both within their jurisdictions and abroad, to join the tourism board they wish, provided that they are located within, or adjacent to, the region which is covered by the board (spatial continuity) (see section 5.3.2.5.3).

However, it is also found that, first of all, such a philosophy has led to the establishment of tourism boards not in agreement with well identified tourism products ('tourism rationale'), but, instead, in accordance with factors of 'convenience' defined by different municipalities, such as 'friendship' and 'political (in)compatibility'. Furthermore, this situation has produced a regional tourism administration which does not fully cover the Portuguese territory, and, as a result of that, there are areas with significant tourism demand and supply which are not the subject of any regional tourism strategy (see section 7.2.1; figures 7.1 and 7.2). Also, the highly fragmented form of Portuguese regional tourism administration, bringing to mind a 'jigsaw' structure (see map 5.6), led to tourism regions whose boundaries show few similarities to other administrative divisions, such as tourism promotion (map 5.5), urban and regional planning and development (map 5.4), districts (map 5.3), agriculture, environment, etc. This situation is viewed as responsible for the lack of coordination which is observed at present between policies set up by the boards and strategies put forward by other departments.

In second place, and as a consequence of an excessive number of boards, it is found that most tourism boards show little intervening capacity in the tourism development process and low efficiency and effectiveness in their operations, as a result of their small budgets, which, in the vast majority of the situations, amount to less than PTE 200m (£0.8m) (see section 7.2.1; figure 7.3). Taking also into account that the largest portion of the resources is spent on administrative and promotion costs, then it is even easier to understand why the Portuguese RTBs are unable to have a real say in problems which emerge within their areas.

The fact that tourism boards have to spend at least 50% of their budgets on promotion is, yet, another negative aspect which is found to strongly affect their operation, for four main reasons. To begin with, as a result of small budgets most promotional actions are characterized by achieving poor results; it was also demonstrated that some of them may even be tagged as

bizarre and grey (see section 7.2.1). Also, the promotional 'imperative' demanded from all boards is hard to understand, when regions show different levels of tourism development. That is, while promotion may assume top priority in less developed areas, its importance may decrease in areas where tourism has already reached mature stages of development and, thus, other priorities such as planning, social protection, and environmental control start to emerge (see sections 5.3.2.3 and 7.2.1).

Furthermore, heavy costs of administration and promotion prevent tourism boards from spending in other important areas, such as planning, development, marketing, inventorying of resources, technical support, and production of information. Finally, tourism boards spend large amounts of money on promotion abroad when there is a national agency with vast responsibilities in that area (the ICT - see section 5.3.2.5.2). Although often argued that the actions undertaken abroad by both tourism boards and the ICT complement each other, it is no less true that this situation represents a duplication of roles, leads to waste of resources, and stimulates competition among them.

The fourth main issue which is found to affect significantly the operation of tourism boards is the low qualification of the staff who work for the boards, since most of them do not have either high education or a background in tourism (see section 7.2.1; figure 7.4). This situation is responsible for the low capacity of the boards to intervene and coordinate the tourism development process (see sections 7.3.7; 7.3.12); to provide useful information and give technical advice to their associates (see section 7.4.3); and, to make tourism participants think that the boards cannot help them that much, and, thus, to the few and infrequent contacts which are established between them and the boards (see sections 7.3.1 and 7.3.5). The effect of the lack of qualified staff in the operation of tourism boards assumes particular relevance when it has been demonstrated in this thesis that the efficiency and effectiveness of the planning forms which ought to be set up in the future depend on the organisations' capacity to design informed, inclusive and comprehensive policies (see section 2.4).

Another matter which is also found to affect negatively the functioning of tourism boards is their inability to generate their own income capable of improving their meager budgets. It has been shown that tourism boards are organisations highly dependent on resources transferred from the national government (about 80%), while the proportion of their own income amounts to less than 1.5% of their budgets. This excessively indolent public sector philosophy and lack of motivation to resolve their own economic problems is viewed by many participants as one of the most important problems which ought to be tackled in the Portuguese regional tourism administration (see section 7.4.3).

The issues enumerated above (i.e. excessive number of boards; administrative borders which do not follow a tourism rationale; incapacity demonstrated by the boards to cover fully the Portuguese territory; shortage of resources and qualified staff; excessive dependence on the national government and lack of dynamics), are among the problems which require direct intervention from the Portuguese government. It seems that these problems can be tackled by redesigning the way in which tourism boards are set up in Portugal. That is, a national strategy, set up from a down-top and inclusive approach, should be launched, with the objective of identifying the main Portuguese tourism products, which, ultimately, would lead to the redesigning of the tourism boards. It should nevertheless not be forgotten that the present situation shows that if tourism boards are to be feasible, they must comprise reasonable areas of the territory and, therefore, the new regional tourism administration cannot assume the fragmented structure observed at present (see map 5.6). It should also be pointed out that if the electoral promise of the present Socialist government about setting up semi-autonomous administrative regions is put forward, then tourism boards should be redesigned in accordance with this administrative framework, in order to ensure the horizontal coordination of tourism policies among the other departments.

The second main source of problems which has been identified as affecting strongly the operations of Portuguese regional administration, is related to their functioning, and in particular to the inefficiency of the relationships which are set up between the boards and the regional commissions. It has been demonstrated that the operation of regional tourism administration is too centralized in the hands of a few (low qualified) personnel who work in the tourism board headquarters, while regional commissions are used mostly to endorse policies set up by the boards (see section 7.3.7).

Nevertheless, it has also been demonstrated that the regional tourism commissions offer great potential to improve the quality of regional tourism administration and, thus, of tourism policy and strategy, as a result of the following. To start with, the vast majority of their members are highly qualified, and their background covers a wide spectrum of areas with which the boards have to deal with (e.g., economics, environment, history, management, law, politics, anthropology, etc) (see section 7.2.7). In second place, participants show strong willingness to cooperate actively with the boards, instead of being viewed only as simple spectators of the activities developed by them (see sections 7.3.7, 7.4.3, 8.2.1, and 8.2.2). Furthermore, they represent organisations with strong power and influence in areas associated with tourism, such as hotels, restaurants, travel agencies, planning, environment, culture, transport, municipalities, and so forth. Also, the organisations tourism participants represent are responsible for producing information of great importance in the design of regional tourism

policies. Therefore, the establishment of close links with them may lead not only to better informed and accountable policies but also to the reduction of their operating costs.

Notwithstanding, what is also demonstrated in this thesis is the fact that, by not exploring fully the potential offered by regional commissions, most tourism policies show poor quality (see section 7.4.3); fail to address the wide diversity of problems and situations of tourism sector and, hence, are not accountable and have led to the fragmentation of the administration (see section 7.3.4). These policies lack coordination among other departments and do not stimulate coordination among the organisations engaged in the tourism sector (see section 7.3.12), and are responsible for tourism being conducted by a handful of prominent organisations instead of being supported by a wide range of organisations, interests and problems (see section 7.3.3). Despite the potential and importance which is recognized in private sector organisations (see section 7.3.14), regional policies have also contributed to them assuming a role within the administration which may be characterized as peripheral (see section 7.3.3), of little influence (see sections 7.3.9), of little importance (in a practical sense and when compared to other organisations) (see section 7.3.10), and with few connections to other members (see sections 7.3.1 and 7.3.5). Weak involvement of tourism participants in the regional administration, and lack of communication among them, is found in this thesis to be an issue which has prompted misunderstandings and conflicts among organisations, and, hence, as having affected negatively the functioning of tourism industry (see section 7.3.13).

In sharp contrast to this situation, what is argued in this thesis is that regional tourism organisation has much to gain if the present bureaucratic and top-down organisational style is replaced by an horizontal one, since, and only by doing so, regional commissions may have active participation in the way policies are set up and the boards are run. With reference to this, it has been demonstrated that the establishment of regional tourism networks may contribute significantly to improving the functioning of tourism boards, since they not only lead to the full optimization of the potential offered by the regional commissions but also put into practice some of the changes which ought to be brought into the core of the planning activity, as discussed previously (see section 9.4). In addition, it is also found that the vast majority of the Portuguese regional tourism participants would welcome the establishment of networks in Portugal even though they are aware that this would not be an easy task (see section 9.4).

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Appendix I

(The Pilot - English version)

QUESTIONNAIRE

Part I

(Characterisation of the organisation)

1. Name: _____

2. Number of employees: _____

3. Last year's budget (approximate) _____

4. How many members (if it is an association) _____

5. Length of operation _____

6. Spatial coverage _____

7. Nature of the organisation (tick as appropriate)

<input type="checkbox"/>	Public
<input type="checkbox"/>	Semi-public
<input type="checkbox"/>	Private

8. Main objective(s) of the organisation _____

9. Does the board of your organisation include representatives of other organisations?

No

Yes (Please specify which organisations) _____

Part II

(Nature and characteristics of contacts set up among the organisations)

Please, answer the following questions taking into account the list of organisations provided by Table I

10. Frequency of contact

How often are contacts made between your organisation and each of the following ones?
(Choose the best answer for each organisation and place it in the appropriate space)

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = a few times a year	— 2	— 9	— 16	— 23	— 30
2 = about once a month	— 3	— 10	— 17	— 24	
3 = about once a week	— 4	— 11	— 18	— 25	
4 = once a day	— 5	— 12	— 19	— 26	
5 = almost hourly	— 6	— 13	— 20	— 27	
6 = continually	— 7	— 14	— 21	— 28	

11. Method of contact

How are most of the contacts made? (Choose only the most common way)

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = telephone	— 2	— 9	— 16	— 23	
2 = letter, memo or reports	— 3	— 10	— 17	— 24	
3 = person-to-person	— 4	— 11	— 18	— 25	
4 = meetings	— 5	— 12	— 19	— 26	
5 = other (please specify)	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

12. Reason of contact

What is the major reason for the contacts

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = to request information	— 2	— 9	— 16	— 23	
2 = to give information	— 3	— 10	— 17	— 24	
3 = to coordinate efforts	— 4	— 11	— 18	— 25	
4 = to settle differences	— 5	— 12	— 19	— 26	
5 = to plan future programs	— 6	— 13	— 20	— 27	
6 = other (please specify)	— 7	— 14	— 21	— 28	

13. Basis of contact

What is the most common basis of the contacts with each organisation?

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = required by law	— 2	— 9	— 16	— 23	
2 = formal agreement between agencies	— 3	— 10	— 17	— 24	
3 = common practice	— 4	— 11	— 18	— 25	
4 = on the basis of a specific need or problem	— 5	— 12	— 19	— 26	
5 = other (please specify)	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

14. Terms of contact

How are the terms of your organisation's interaction with the organisations reached?

The terms are set:

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = Completely by them	— 2	— 9	— 16	— 23	
2 = Mostly by them	— 3	— 10	— 17	— 24	
3 = Mutually	— 4	— 11	— 18	— 25	
4 = Mostly by us	— 5	— 12	— 19	— 26	
5 = Completely by us	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

15. Influence of contact

When representatives of your organisation meet with the other organisations to discuss issues of mutual concern, how much influence does each of the following organisations have on the decisions reached?

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = a great deal of influence	— 2	— 9	— 16	— 23	—
2 = quite influence	— 3	— 10	— 17	— 24	
3 = some influence	— 4	— 11	— 18	— 25	
4 = little influence	— 5	— 12	— 19	— 26	
5 = no influence at all	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

16. Importance of contact

How important are the contacts with each of these organisations to the work of your own organisation?

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = very important	— 2	— 9	— 16	— 23	—
2 = quite important	— 3	— 10	— 17	— 24	
3 = moderately important	— 4	— 11	— 18	— 25	
4 = little important	— 5	— 12	— 19	— 26	
5 = not important at all	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

17. Benefits of contact

How much does your organisation benefit in attaining its goals as a result of its interaction with the following organisations?

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = considerable benefit	— 2	— 9	— 16	— 23	—
2 = a fair amount of benefit	— 3	— 10	— 17	— 24	
3 = some benefit	— 4	— 11	— 18	— 25	
4 = little benefit	— 5	— 12	— 19	— 26	
5 = no benefit at all	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

18. Importance of the other organisations

How important is each of the following organisations for the operations of your organisation?

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = very important	— 2	— 9	— 16	— 23	—
2 = quite important	— 3	— 10	— 17	— 24	
3 = moderately important	— 4	— 11	— 18	— 25	
4 = little important	— 5	— 12	— 19	— 26	
5 = no important at all	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

19. Tension of contact

To what extent does tension exist between your organisation and the following organisations?

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = a lot of tension	— 2	— 9	— 16	— 23	—
2 = a fair amount of tension	— 3	— 10	— 17	— 24	
3 = some tension	— 4	— 11	— 18	— 25	
4 = little tension	— 5	— 12	— 19	— 26	
5 = no tension at all	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

20. Interference of contact

To what extent the following organisations have attempted to interfere with the attainment of the goals of your organisation in areas of overlapping interest?

0 = no contact	___ 1	___ 8	___ 15	___ 22	___ 29
1 = a lot of interference	___ 2	___ 9	___ 16	___ 23	
2 = a fair amount of interference	___ 3	___ 10	___ 17	___ 24	
3 = some interference	___ 4	___ 11	___ 18	___ 25	
4 = little interference	___ 5	___ 12	___ 19	___ 26	
5 = no interference at all	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

21. Extent of conflict

To what extent do disagreements or disputes characterise the relations between your organisation and each of the others?

0 = no contact	___ 1	___ 8	___ 15	___ 22	___ 29
1 = to a great extent	___ 2	___ 9	___ 16	___ 23	
2 = to a moderate extent	___ 3	___ 10	___ 17	___ 24	
3 = to a small extent	___ 4	___ 11	___ 18	___ 25	
4 = never	___ 5	___ 12	___ 19	___ 26	
	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

22. Nature of conflict

What is the major basis of the disagreements or disputes between your organisation and each of the others?

0 = no contacts	___ 1	___ 8	___ 15	___ 22	___ 29
1 = no disagreements	___ 2	___ 9	___ 16	___ 23	
2 = handling of specific area	___ 3	___ 10	___ 17	___ 24	
3 = different operating philosophies	___ 4	___ 11	___ 18	___ 25	
4 = personality differences	___ 5	___ 12	___ 19	___ 26	
5 = overlapping or duplication of services	___ 6	___ 13	___ 20	___ 27	
6 = inefficiency	___ 7	___ 14	___ 21	___ 28	
7 = differences in power					
8 = other (please specify)					

23. Quality of conflict resolution

How well are any differences between your organisation and the other worked out?

0 = no contact	___ 1	___ 8	___ 15	___ 22	___ 29
1 = very well	___ 2	___ 9	___ 16	___ 23	
2 = well	___ 3	___ 10	___ 17	___ 24	
3 = adequately	___ 4	___ 11	___ 18	___ 25	
4 = poorly	___ 5	___ 12	___ 19	___ 26	
5 = very poorly	___ 6	___ 13	___ 20	___ 27	
6 = no differences have arisen	___ 7	___ 14	___ 21	___ 28	

24. Compatibility

To what extent are the goals of the following organisations compatible with the goals of your organisation?

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = very compatible	— 2	— 9	— 16	— 23	
2 = quite compatible	— 3	— 10	— 17	— 24	
3 = moderately compatible	— 4	— 11	— 18	— 25	
4 = little compatible	— 5	— 12	— 19	— 26	
5 = not compatible at all	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

25. Extent of coordination

How well are the activities of your organisation and those of each of the other organisations coordinated?

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = very well	— 2	— 9	— 16	— 23	
2 = well	— 3	— 10	— 17	— 24	
3 = adequately	— 4	— 11	— 18	— 25	
4 = poorly	— 5	— 12	— 19	— 26	
5 = very poorly	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

26. Power of focal agency

If we define power as the extent to which one organisation affects another organisation, how would you characterise the power relationship between your organisation and each of the other organisations in regard to the handling of problem tourism?

1 = my organisation is much more powerful	— 1	— 8	— 15	— 22	— 29
2 = my organisation is more powerful	— 2	— 9	— 16	— 23	
3 = both organisations are equally powerful	— 3	— 10	— 17	— 24	
4 = my organisation is less powerful	— 4	— 11	— 18	— 25	
5 = my organisation is much less powerful	— 5	— 12	— 19	— 26	
	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

27. Compatibility of operating philosophy

How compatible is your organisation's operating philosophy with that of each of the other organisations?

0 = no contact	— 1	— 8	— 15	— 22	— 29
1 = very compatible	— 2	— 9	— 16	— 23	
2 = moderately compatible	— 3	— 10	— 17	— 24	
3 = not compatible	— 4	— 11	— 18	— 25	
	— 5	— 12	— 19	— 26	
	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

28. Perception of performance

How well does each of the other agencies perform its task with regard to problem tourism?

1 = very well	— 1	— 8	— 15	— 22	— 29
2 = well	— 2	— 9	— 16	— 23	
3 = adequately	— 3	— 10	— 17	— 24	
4 = poorly	— 4	— 11	— 18	— 25	
5 = very poorly	— 5	— 12	— 19	— 26	
	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

29. Quality of communication

How would you characterise the quality of communication between your organisation and each of the other organisations?

1 = no reason for communication	— 1	— 8	— 15	— 22	— 29
2 = very good communication	— 2	— 9	— 16	— 23	
3 = good communication	— 3	— 10	— 17	— 24	
4 = adequate communication	— 4	— 11	— 18	— 25	
5 = poor communication	— 5	— 12	— 19	— 26	
6 = very poor communication	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

30. Competence of personnel

How would you describe the competence of the personnel in each of the other organisations?

1 = all are competent	— 1	— 8	— 15	— 22	— 29
2 = most are competent	— 2	— 9	— 16	— 23	
3 = some are competent	— 3	— 10	— 17	— 24	
4 = few are competent	— 4	— 11	— 18	— 25	
5 = none are competent	— 5	— 12	— 19	— 26	
	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

PART III

(Willingness in joining a tourism network; Advantages and disadvantages of tourism networks)

31. Benefits of network

If a network is set up among the organisations which are mentioned how would you classify the benefits gained by each organisation in joining the network (please consider your organisation as well)

1 = will benefit very much	— 1	— 8	— 15	— 22	— 29
2 = will benefit a fair amount	— 2	— 9	— 16	— 23	
3 = will have some benefit	— 3	— 10	— 17	— 24	
4 = will have little benefit	— 4	— 11	— 18	— 25	
5 = will have no benefit at all	— 5	— 12	— 19	— 26	
	— 6	— 13	— 20	— 27	
	— 7	— 14	— 21	— 28	

32. Willingness of change

The creation of a network involves the standardisation of several aspects in the way an organisation is run for facilitating communication among all the partners, namely in terms of administrative procedures, time-tables, work-schedules, etc. How willing would you be to adapt the way your organisation is run to a different one to ensure higher working compatibility?:

1. very willing	
2. quite willing	
3. moderately willing	
4. not very willing	
5. not willing at all	

33. Willingness of joining a network

How willing would you be to join a network based upon these organisations?

1. very willing	
2. quite willing	
3. moderately willing	
4. not very willing	
5. not willing at all	

34. Coordination of network

If a network is established which organisation do you believe should assume the coordinating role? (choose only the one you consider as the most appropriate to develop this role)

- 1 — 8 — 15 — 22 — 29
- 2 — 9 — 16 — 23
- 3 — 10 — 17 — 24
- 4 — 11 — 18 — 25
- 5 — 12 — 19 — 26
- 6 — 13 — 20 — 27
- 7 — 14 — 21 — 28

35. Main objective of network

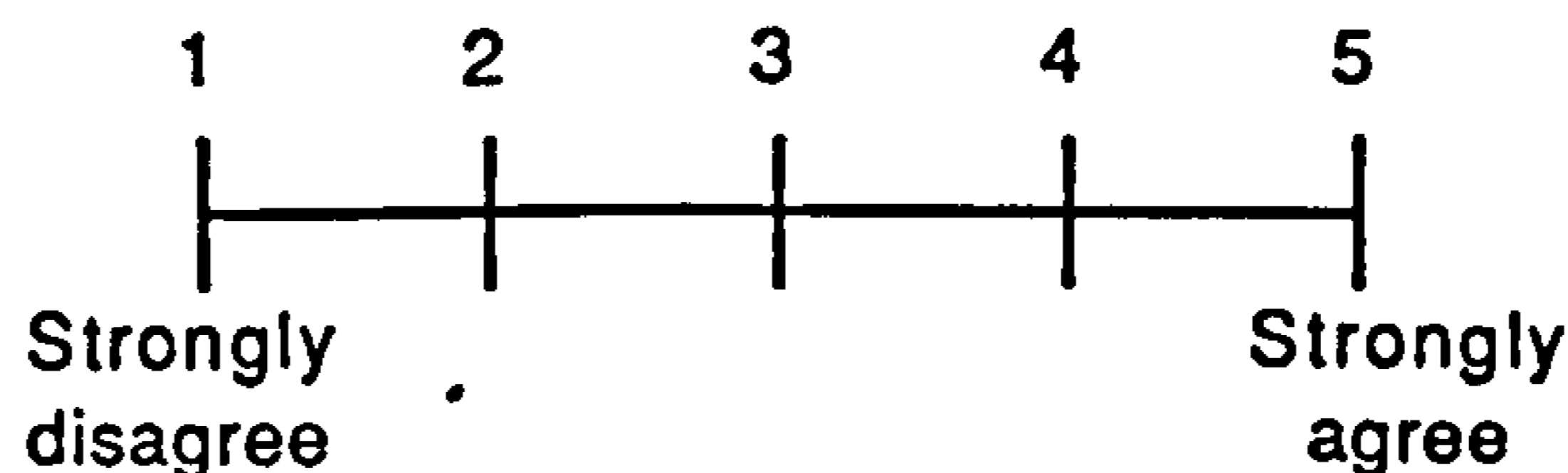
What do you think should be the main focus of the network? (please, choose only one answer)

	none
	policy ideal-type
	control ideal-type
	communication ideal-type
	other (please specify) _____

Please, consider the following statements and classify them according to the following five point scale

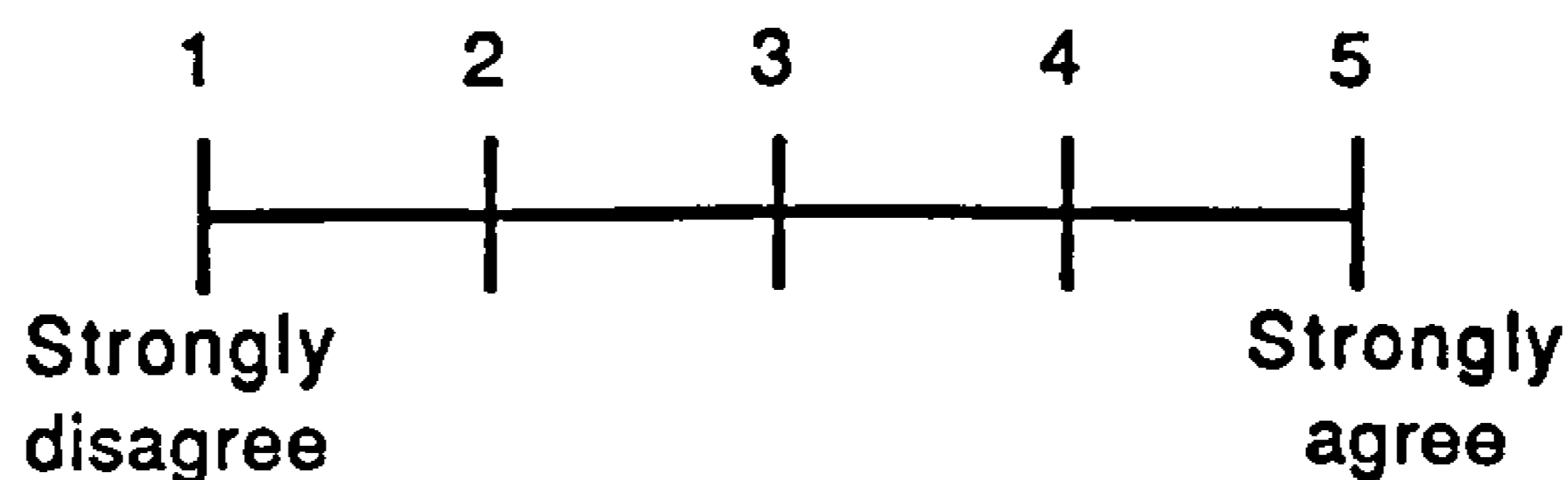
36. Power of networking

Networks are rather more powerful than individual organisations, in the sense they can more easily influence national, regional and local policies, and access to financial resources.



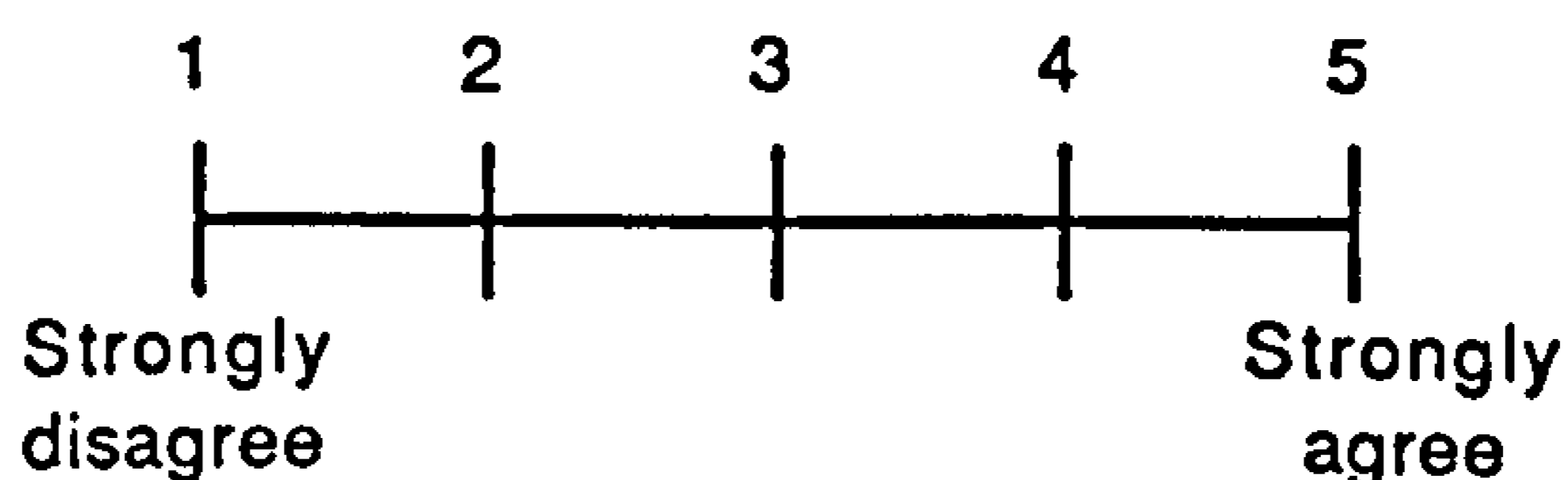
37. Competitive advantages of networking

Networks have a stronger capacity for competition in the travel and tourism market



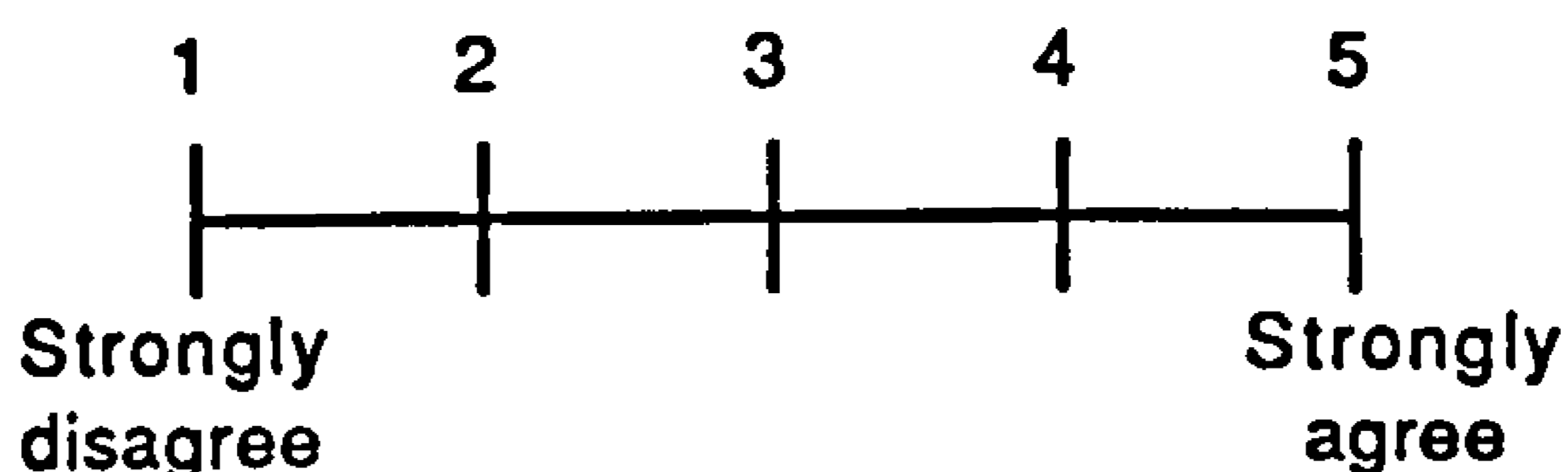
38. Crisis response of networking

Networks respond better to crisis in the tourism market in recession periods.



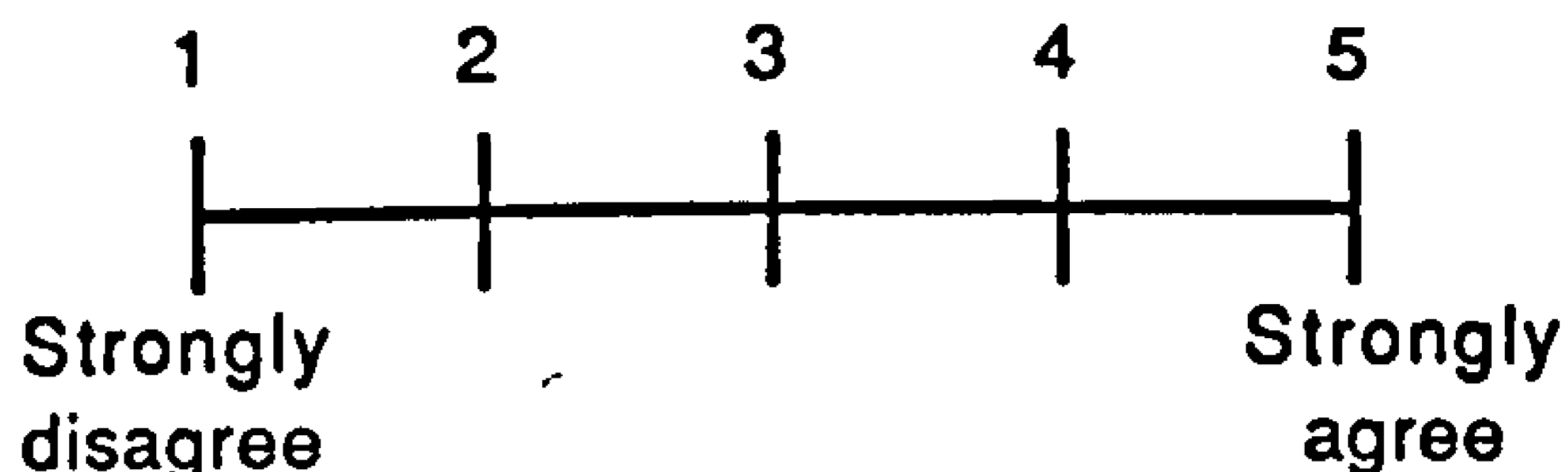
39. Quality of policy

When tourism policy and strategy are designed in a networking scheme better informed solutions are brought into the decision-making and decision-taking processes



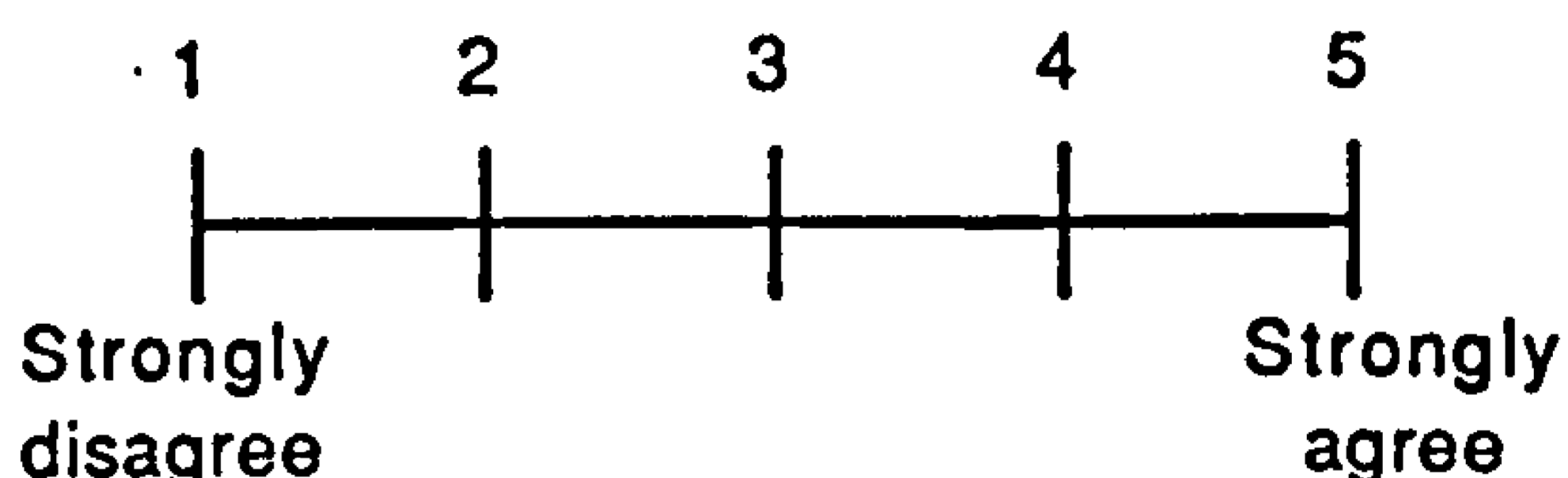
40. Management and allocation of resources

Regional resources are better managed and allocated in a networking scheme rather than managed and allocated by separate organisations



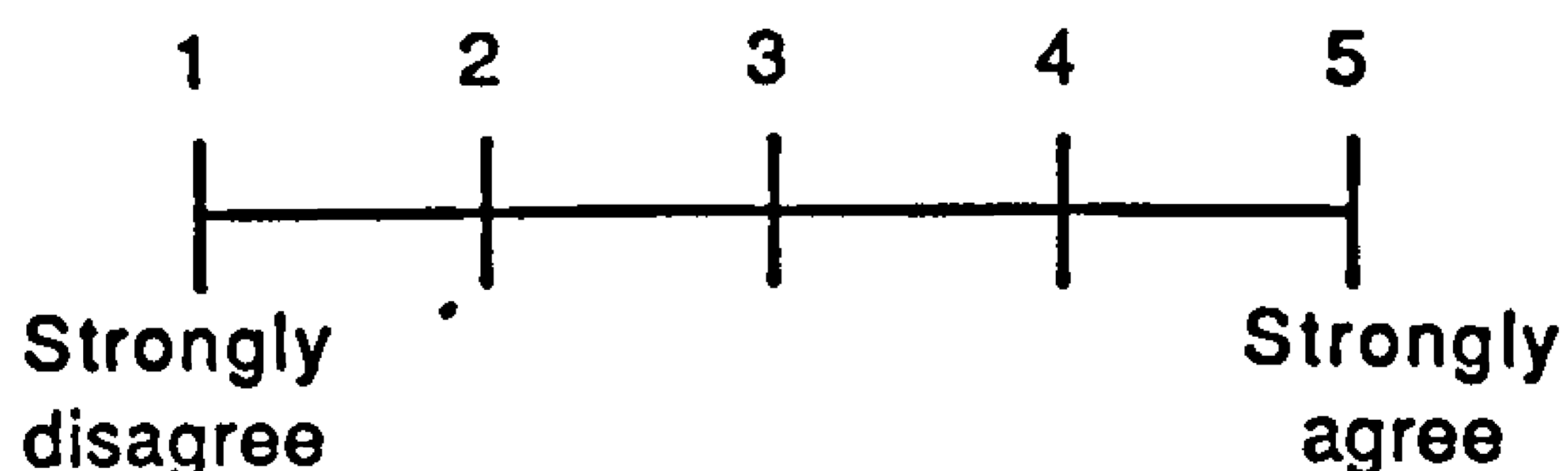
41. Efficiency, effectiveness and adequacy of tourist policy

The efficiency, effectiveness and adequacy of tourism policies increase if they are set up through the involvement of all organisations linked to the tourism sector



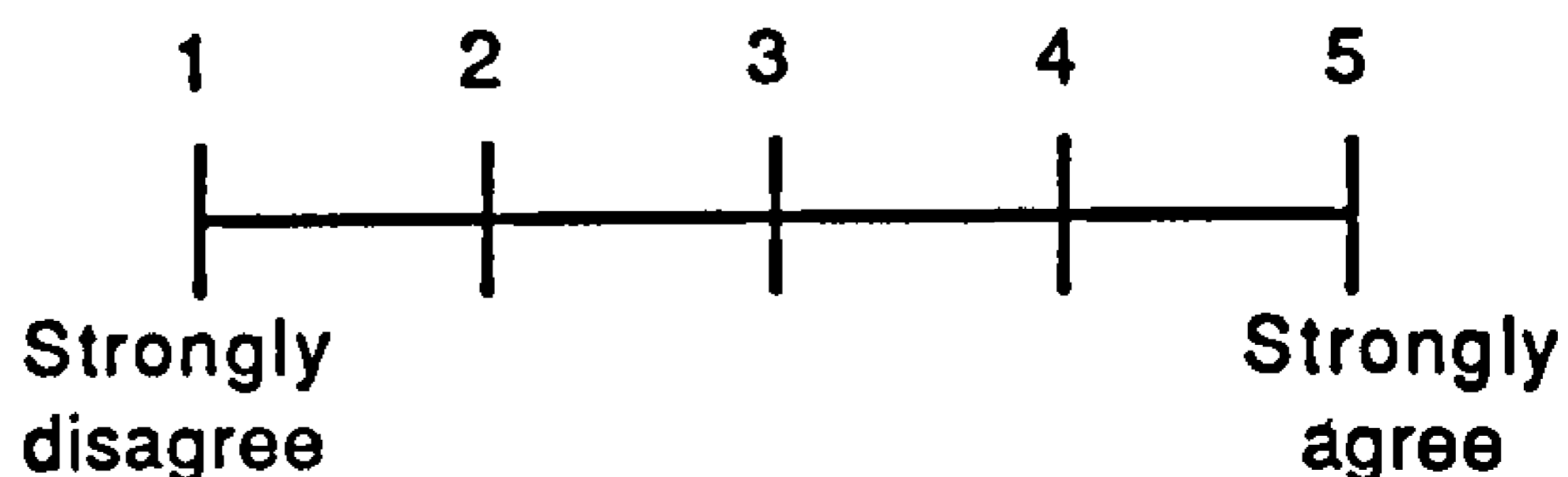
42. Effects on the private sector's functioning

Networks affect the functioning of the market since they affect the private sector's free initiative.



43. Effects on the market transparency

If there is an organisation where there are representatives from different organisations, each organisation may perceive better strategies designed by other agencies, and, therefore, may set up more efficient and effective policies for his/her organisation



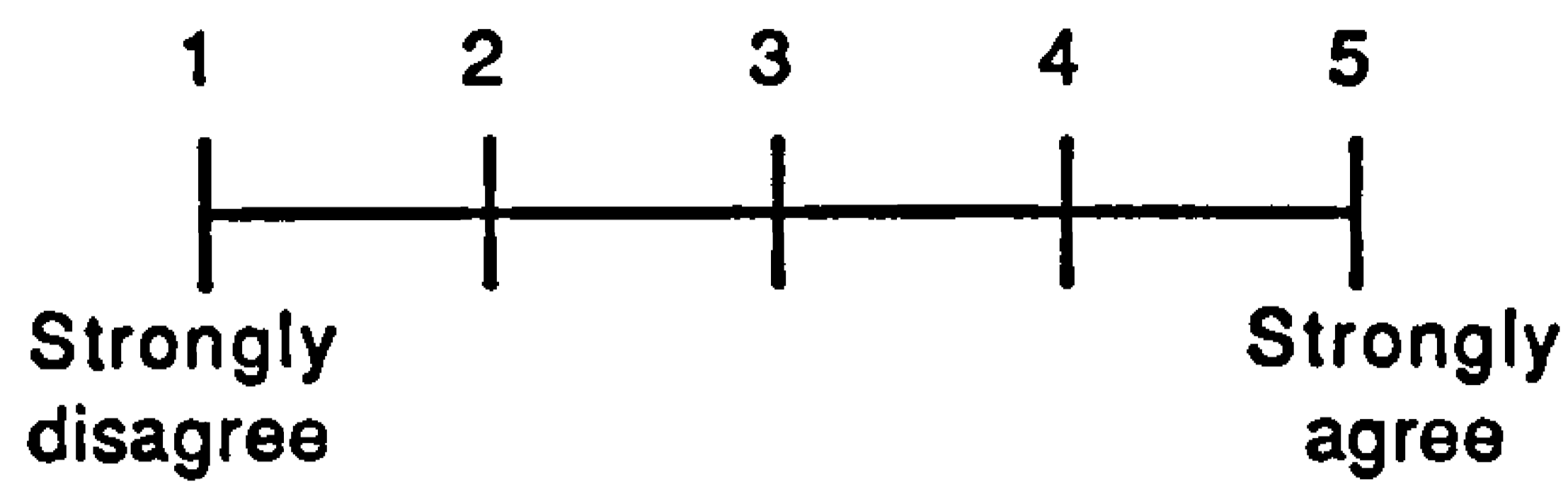
44. Public and private sectors' benefits

Who benefits from networks?

	Exclusively public sector organisations
	Mostly public sector organisations
	Mutually public and private sector organisations
	Mostly private sector organisations
	Exclusively private sector organisations

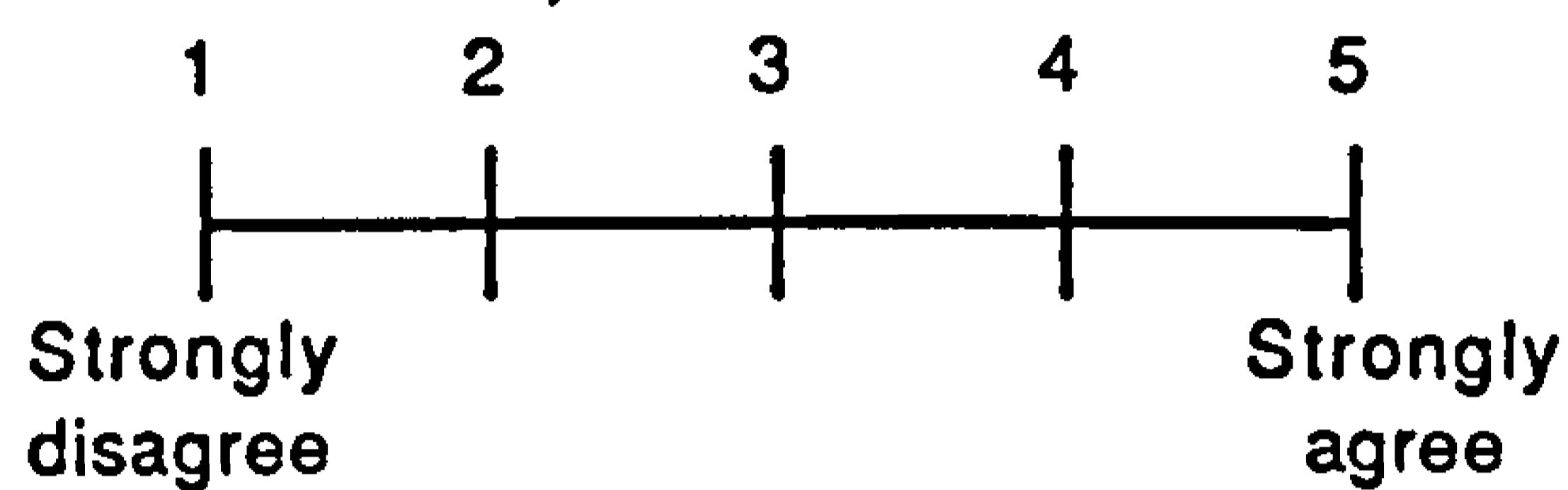
45. Effects on less powerful organisations

The importance of less influential organisations such as non-profit organisations (e.g, social and cultural organisations) will decrease if they join a network since they will not be able to bargain with other more powerful organisations such as economic groups and government organisations



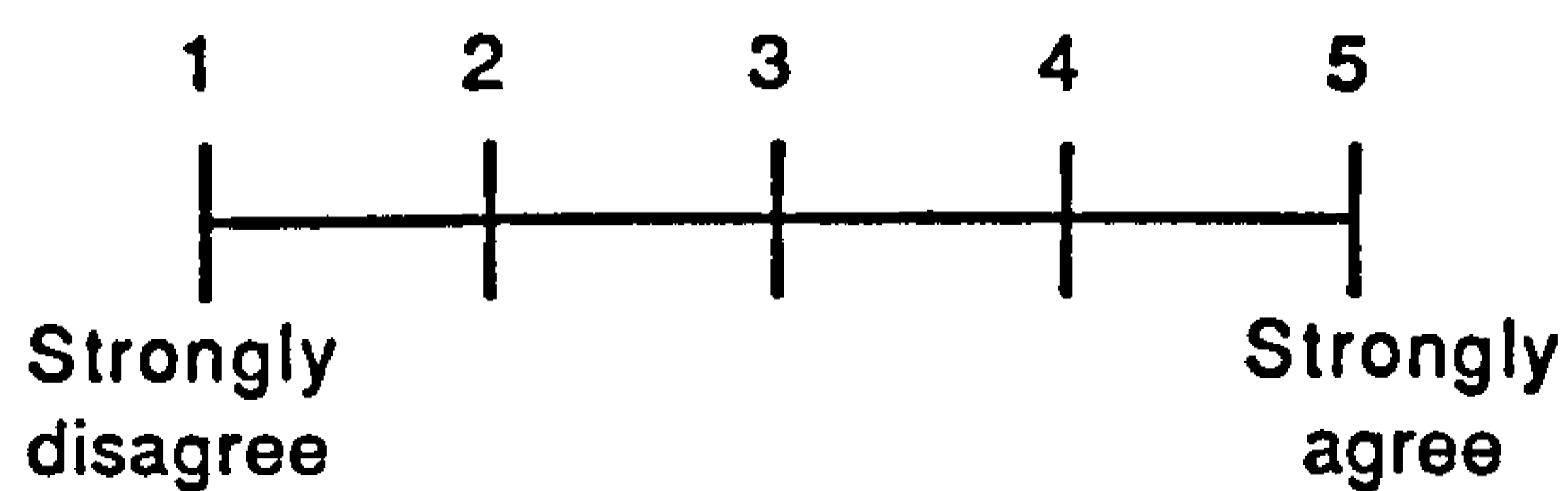
46. Response to supra-national treats

Networks respond better to the challenges imposed by supra-national agreements (e.g, EU and GATT) in terms of competitiveness, access to external markets and funding, adaptation to international legislation affecting the functioning of member-states, new organisational methods, lobbying, etc



47. Perception of the future of networking

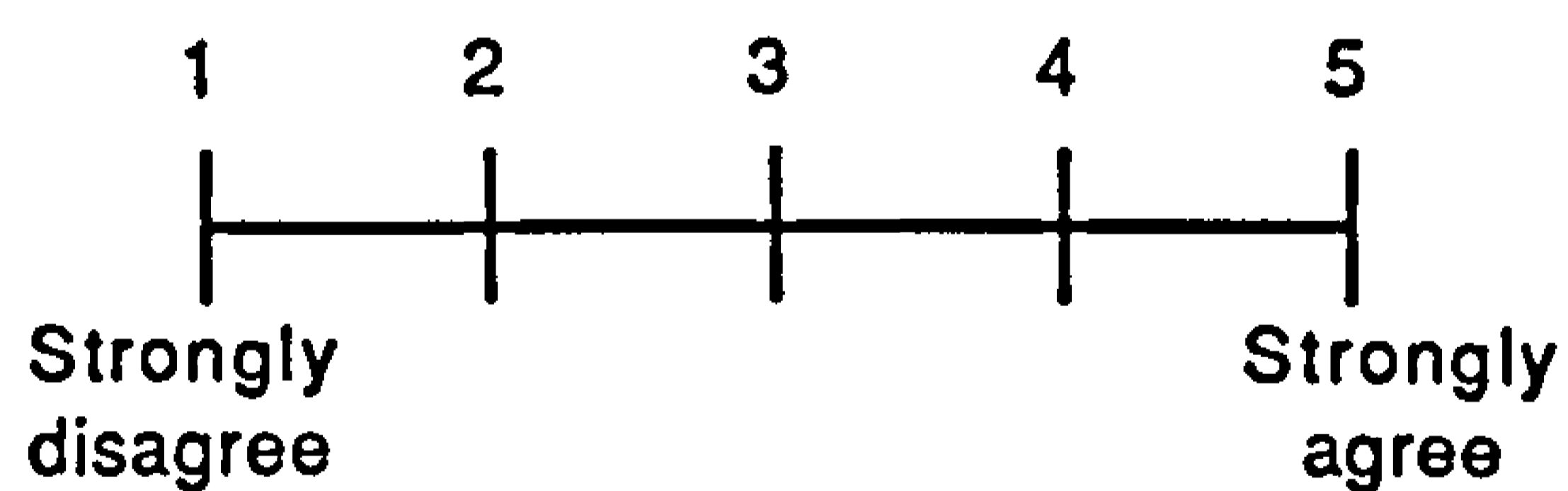
It is likely that in future tourist organisations will evolve towards networks



48. Contradictions and conflicts of networks

How do you see the potential contradictions that might emerge among the different partners if they join a network:

(a) Leading to better solutions?



(b) Leading to unsolved conflicts?

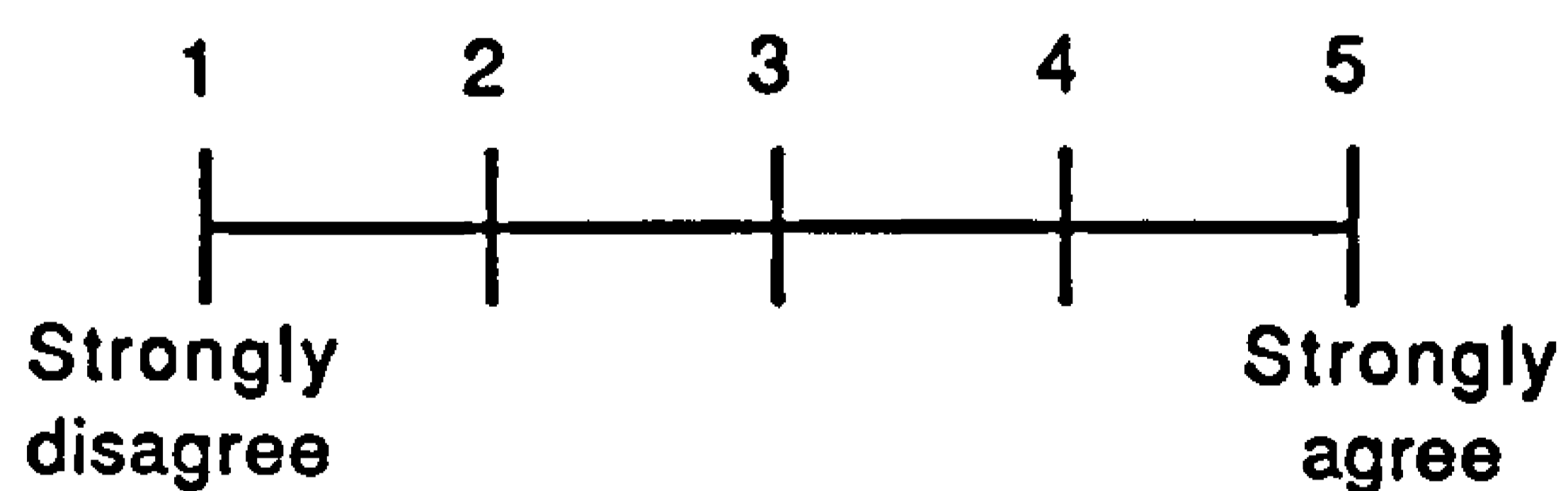


Table I**Organisations included in the
Rota da Luz Regional Tourism Board**

1. Câmara Municipal de Agueda
2. Câmara Municipal de Albergaria-a-Velha
3. Câmara Municipal de Estarreja
4. Câmara Municipal de Ilhavo
5. Câmara Municipal de Oliveira de Azemeis
6. Câmara Municipal de Oliveira do Bairro
7. Câmara Municipal de Vale de Cambra
8. Câmara Municipal de Arouca
9. Câmara Municipal de Aveiro
10. Câmara Municipal de Ovar
11. Câmara Municipal de Castelo de Paiva
12. Câmara Municipal de Murtosa
13. Câmara Municipal de Sever do Vouga
14. Câmara Municipal de Vagos
15. Região de Turismo da Rota da Luz
16. Universidade de Aveiro
17. Comissão de Coordenação da Região do Norte (CCRN)
18. Comissão de Coordenação da Região do Centro (CCRC)
19. Direcção-Geral da Marinha
20. Junta Autónoma do Porto de Aveiro
21. Representante dos Estabelecimentos Hoteleiros
22. Representante dos Estabelecimentos Similares dos Hoteleiros
23. Representante das Agências de Viagens e de Turismo
24. Representante das Agências de Automóveis de Aluguer sem Condutor
25. Representante dos Parques de Campismo
26. Representante da Federação de Folclore Português
27. Representante das Organizações Sindicais das Ind. de Hotel. e Similares
28. Representante da Delegação em Aveiro do Instituto do Desporto
29. Representante do Ministério do Comércio e Turismo

Appendix Ia

(The Pilot - Portuguese version)

QUESTIONÁRIO

1. Este questionário insere-se num trabalho de Investigação de Doutoramento a decorrer na Universidade de Surrey (Inglaterra).
2. A qualidade do trabalho final depende da sua preciosa colaboração. Por favor, leia atentamente as questões colocadas e escolha a resposta que mais se adequa à sua opinião.
3. Este questionário é confidencial, pelo que os resultados finais nunca identificarão directamente as pessoas e as organizações que o estão a responder. Assim, mesmo que algumas das questões possam ser na sua opinião mais delicadas, por favor responda com o maior rigor possível, dado que pelo facto se tratar de um trabalho de investigação o sigilo em torno das questões será sempre escrupulosamente respeitado.
4. Neste questionário não se pretende saber qual a sua opinião pessoal sobre os assuntos colocados. Responda sim às questões tomando em consideração o facto de ser o coordenador ou representante da organização que está a representar.
4. Muito obrigado pela sua colaboração!!

Parte I

(Caracterização da organização)

1. Nome: _____
2. Número total de funcionários (inclui técnicos e administrativos): _____
3. Montante do orçamento do último ano (1993) (aproximado): _____
4. Ano de início de funcionamento: _____
5. Área geográfica abrangida pela organização: _____

6. Número de entidades/associados que fazem parte da organização (caso se trate de uma associação): _____

7. Natureza da organização (assinale com uma cruz)

<input type="checkbox"/>	Pública (a organização é constituída apenas por organismos da administração pública)
<input type="checkbox"/>	Pública/Privada (a organização é constituída por organismos da administração pública e privada)
<input type="checkbox"/>	Privada (a organização é constituída apenas por organismos privados)

8. Objectivos principais da organização: _____

9. Os órgãos directivos incluem representantes de outras organizações?

- Não
- Sim (por favor, especifique quais as organizações)

Part II

(Natureza e características dos contactos entre as organizações)

NOTA: nesta segunda parte do inquérito vai utilizar-se a palavra 'contacto' para definir o conjunto de relações estabelecidas entre organizações. Estas relações podem compreender desde a simples troca de ideias realizadas de uma forma formal ou informal até à definição de estratégias concertadas de actuação na área do turismo, as quais podem ser levadas a efeito através de conversas directas, por telefone, por troca de relatórios, até a relações institucionais oficiais ou não levadas a cabo ao nível de qualquer organização. Isto é, a palavra contacto deverá ser entendida no seu sentido mais abrangente.

Por Favor! Responda às seguintes questões tendo em conta a informação fornecida pela Tabela I

10. Com que frequência são estabelecidos contactos entre a sua organização e as seguintes organizações? (Escolha a resposta mais adequada para cada uma das seguintes organizações)

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = algumas vezes por ano	___ 2	___ 9	___ 16	___ 23	
2 = cerca de uma vez por mês	___ 3	___ 10	___ 17	___ 24	
3 = cerca de uma vez por semana	___ 4	___ 11	___ 18	___ 25	
4 = uma vez por dia	___ 5	___ 12	___ 19	___ 26	
5 = aproximadamente de hora a hora	___ 6	___ 13	___ 20	___ 27	
6 = permanentemente	___ 7	___ 14	___ 21	___ 28	

11. Como são estabelecidos os contactos? (Escolha apenas a forma mais usual de contacto)

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = telefone	___ 2	___ 9	___ 16	___ 23	
2 = carta, memorandos ou relatórios	___ 3	___ 10	___ 17	___ 24	
3 = pessoalmente	___ 4	___ 11	___ 18	___ 25	
4 = reuniões	___ 5	___ 12	___ 19	___ 26	
5 = outros (por favor, indique quais)	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

12. Qual a razão principal pela qual contacta cada uma das seguintes organizações?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = para pedir informações/dados	___ 2	___ 9	___ 16	___ 23	
2 = para dar informações/dados	___ 3	___ 10	___ 17	___ 24	
3 = para coordenar esforços/estratégias	___ 4	___ 11	___ 18	___ 25	
4 = para estabelecer diferenças na actuação das organizações	___ 5	___ 12	___ 19	___ 26	
5 = para planear estratégias	___ 6	___ 13	___ 20	___ 27	
6 = outras (por favor, indique quais)	___ 7	___ 14	___ 21	___ 28	

13. Qual a principal razão que está na base do contacto com cada uma das organizações?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = devido a imposições legais	___ 2	___ 9	___ 16	___ 23	
2 = acordo estabelecido directamente com a organização	___ 3	___ 10	___ 17	___ 24	
3 = prática habitual	___ 4	___ 11	___ 18	___ 25	
4 = os contactos são estabelecidos em função de problemas ou necessidades específicas	___ 5	___ 12	___ 19	___ 26	—
5 = outras (por favor, indique quais)	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

14. Quando são (ou foram) estabelecidas relações/contactos entre a sua organização e cada uma das seguintes organizações quem define (ou definiu) a base/forma dessa mesma relação?

A base da relação é (foi) estabelecida:

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = completamente por eles	___ 2	___ 9	___ 16	___ 23	
2 = principalmente por eles	___ 3	___ 10	___ 17	___ 24	
3 = mutuamente	___ 4	___ 11	___ 18	___ 25	
4 = principalmente por nós	___ 5	___ 12	___ 19	___ 26	
5 = completamente por nós	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

15. Quando representantes da sua organização se encontram com as outras organizações para discutir assuntos de interesse mútuo, qual o grau de influência que cada uma das seguintes organizações possui para a decisão final?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = muita influência	___ 2	___ 9	___ 16	___ 23	
2 = bastante influência	___ 3	___ 10	___ 17	___ 24	
3 = mais ou menos influência	___ 4	___ 11	___ 18	___ 25	
4 = pouca influência	___ 5	___ 12	___ 19	___ 26	
5 = nenhuma influência	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

16. Qual a importância do contacto com cada uma das seguintes organizações para o funcionamento da sua organização?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = muito importante	___ 2	___ 9	___ 16	___ 23	
2 = importante	___ 3	___ 10	___ 17	___ 24	
3 = mais ou menos importante	___ 4	___ 11	___ 18	___ 25	
4 = pouco importante	___ 5	___ 12	___ 19	___ 26	
5 = nada importante	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

17. Que benefícios trás para a prossecução dos objectivos da sua organização o contacto com as seguintes organizações?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = beneficia muito	___ 2	___ 9	___ 16	___ 23	
2 = beneficia bastante	___ 3	___ 10	___ 17	___ 24	
3 = beneficia mais ou menos	___ 4	___ 11	___ 18	___ 25	
4 = beneficia pouco	___ 5	___ 12	___ 19	___ 26	
5 = não beneficia nada	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

18. Qual a importância de cada uma das seguintes organizações para o funcionamento da sua organização?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = muito importante	___ 2	___ 9	___ 16	___ 23	
2 = importante	___ 3	___ 10	___ 17	___ 24	
3 = mais ou menos importante	___ 4	___ 11	___ 18	___ 25	
4 = pouco importante	___ 5	___ 12	___ 19	___ 26	
5 = nada importante	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

19. Qual é o grau de tensão/mau estar que existe entre a sua organização e cada uma das seguintes organizações?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = existe muita tensão	___ 2	___ 9	___ 16	___ 23	
2 = existe tensão	___ 3	___ 10	___ 17	___ 24	
3 = existe mais ou menos alguma tensão	___ 4	___ 11	___ 18	___ 25	
4 = existente pouca tensão	___ 5	___ 12	___ 19	___ 26	
5 = não existe tensão nenhuma	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

20. Com que intensidade é que cada uma das seguintes organizações costuma tentar interferir na prossecução dos objectivos da sua organização em áreas de interesse comum?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = tenta interferir muito	___ 2	___ 9	___ 16	___ 23	
2 = tenta interferir bastante	___ 3	___ 10	___ 17	___ 24	
3 = tenta interferir mais ou menos	___ 4	___ 11	___ 18	___ 25	
4 = tenta interferir pouco	___ 5	___ 12	___ 19	___ 26	
5 = não tenta interferir nada	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

21. Com que intensidade é que discórdias e disputas caracterizam o relacionamento da sua organização com cada uma das seguintes organizações?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = com grande intensidade	___ 2	___ 9	___ 16	___ 23	
2 = com moderada intensidade	___ 3	___ 10	___ 17	___ 24	
3 = com pouca intensidade	___ 4	___ 11	___ 18	___ 25	
4 = nunca há discórdias ou conflitos	___ 5	___ 12	___ 19	___ 26	
	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

22. Qual é a principal base de desentendimento entre a sua organização e cada uma das seguintes organizações?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = não há desentendimentos	___ 2	___ 9	___ 16	___ 23	
2 = na resolução de aspectos específicos	___ 3	___ 10	___ 17	___ 24	
3 = diferentes formas de funcionamento	___ 4	___ 11	___ 18	___ 25	
4 = diferenças de personalidade	___ 5	___ 12	___ 19	___ 26	
5 = devido a haver sobreposição ou duplicação de funções	___ 6	___ 13	___ 20	___ 27	
6 = diferenças de eficiência	___ 7	___ 14	___ 21	___ 28	
7 = diferenças de poder					
8 = outras (por favor indique quais)					

23. De que forma é que as diferenças de funcionamento e de objectivos entre a sua organização e cada uma das seguintes organizações são ultrapassadas?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = muito bem	___ 2	___ 9	___ 16	___ 23	
2 = bem	___ 3	___ 10	___ 17	___ 24	
3 = mais ou menos	___ 4	___ 11	___ 18	___ 25	
4 = mal	___ 5	___ 12	___ 19	___ 26	
5 = muito mal	___ 6	___ 13	___ 20	___ 27	
6 = não há diferenças	___ 7	___ 14	___ 21	___ 28	

24. De que forma é que os objectivos de cada uma das seguintes organizações são compatíveis com os da sua organização?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = muito compatíveis	___ 2	___ 9	___ 16	___ 23	
2 = bastante compatíveis	___ 3	___ 10	___ 17	___ 24	
3 = mais ou menos compatíveis	___ 4	___ 11	___ 18	___ 25	
4 = pouco compatíveis	___ 5	___ 12	___ 19	___ 26	
5 = nada compatíveis	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

25. Com que intensidade é que as actividades da sua organização são coordenadas com cada uma das seguintes organizações?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = muito bem coordenadas	___ 2	___ 9	___ 16	___ 23	
2 = bastante coordenadas	___ 3	___ 10	___ 17	___ 24	
3 = mais ou menos coordenadas	___ 4	___ 11	___ 18	___ 25	
4 = pouco coordenadas	___ 5	___ 12	___ 19	___ 26	
5 = nada coordenadas	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

26. Se definirmos 'poder' como a capacidade que uma organização possui para influenciar outra organização, como compara o poder da sua organização em relação a cada uma das seguintes organizações?

1 = a minha organização é muito mais poderosa	___ 1	___ 8	___ 15	___ 22	___ 29
2 = a minha organização é mais poderosa	___ 2	___ 9	___ 16	___ 23	
3 = as duas organizações são igualmente poderosas	___ 3	___ 10	___ 17	___ 24	
4 = a minha organização é menos poderosa	___ 4	___ 11	___ 18	___ 25	
5 = a minha organização é muito menos poderosa	___ 5	___ 12	___ 19	___ 26	
	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

27. Como compara a forma/filosofia de funcionamento da sua organização em relação a cada uma das seguintes organizações?

0 = não são estabelecidos contactos	___ 1	___ 8	___ 15	___ 22	___ 29
1 = muito compatível	___ 2	___ 9	___ 16	___ 23	
2 = compatível	___ 3	___ 10	___ 17	___ 24	
3 = mais ou menos compatível	___ 4	___ 11	___ 18	___ 25	
4 = pouco compatível	___ 5	___ 12	___ 19	___ 26	
5 = não compatível/incompatível	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

28. Como classifica o grau de desempenho das funções de cada uma das seguintes organizações?

Na área do turismo a organização desempenha as suas funções:

1 = muito bem	___ 1	___ 8	___ 15	___ 22	___ 29
2 = bem	___ 2	___ 9	___ 16	___ 23	
3 = razoavelmente	___ 3	___ 10	___ 17	___ 24	
4 = mal	___ 4	___ 11	___ 18	___ 25	
5 = muito mal	___ 5	___ 12	___ 19	___ 26	
	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

29. Como classifica a qualidade da comunicação entre a sua organização e cada uma das seguintes organizações?

1 = não há razões para haver comunicação	___ 1	___ 8	___ 15	___ 22	___ 29
2 = muito boa comunicação	___ 2	___ 9	___ 16	___ 23	
3 = boa comunicação	___ 3	___ 10	___ 17	___ 24	
4 = razoável comunicação	___ 4	___ 11	___ 18	___ 25	
5 = má comunicação	___ 5	___ 12	___ 19	___ 26	
6 = muito má comunicação	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

30. De uma forma geral como classifica a competência das pessoas que trabalham em cada uma das seguintes organizações?

1 = todos são competentes	___ 1	___ 8	___ 15	___ 22	___ 29
2 = a maioria é competente	___ 2	___ 9	___ 16	___ 23	
3 = alguns são competentes	___ 3	___ 10	___ 17	___ 24	
4 = poucos são competentes	___ 4	___ 11	___ 18	___ 25	
5 = são todos incompetentes	___ 5	___ 12	___ 19	___ 26	
	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

PARTE III

(Vantagens e desvantagens da criação de uma rede de organizações na área do turismo)

NOTA: nesta parte do trabalho a palavra 'rede' deverá ser entendida como uma organização composta por todos os agentes com influência directa ou indirecta no turismo. Nesta organização em rede é suposto que as estratégias, políticas e orientações para o turismo regional são elaboradas em parceria por todas as organizações com assento na rede. Isto é, as propostas de política e estratégia para o turismo não são oriundas de apenas uma organização mas sim elaboradas a partir da discussão e negociação no conjunto de todas as organizações com influência directa ou indirecta no turismo.

31. Se fosse criada uma organização para o turismo baseada nas organizações em análise como classificaria os benefícios ganhos por cada uma das organizações caso aderisse a essa mesma organização? (por favor, considere igualmente a sua organização nesta questão)

1 = beneficiaria muito	___ 1	___ 8	___ 15	___ 22	___ 29
2 = beneficiaria bastante	___ 2	___ 9	___ 16	___ 23	
3 = beneficiaria mais ou menos	___ 3	___ 10	___ 17	___ 24	
4 = beneficiaria pouco	___ 4	___ 11	___ 18	___ 25	
5 = não beneficiaria nada	___ 5	___ 12	___ 19	___ 26	
	___ 6	___ 13	___ 20	___ 27	
	___ 7	___ 14	___ 21	___ 28	

32. A eventual criação de uma organização em rede constituída pelo conjunto de todas as organizações, iria implicar que cada uma das organizações adaptasse alguns aspectos do seu funcionamento a uma forma 'standard', nomeadamente em termos de alguns aspectos administrativos, formas de trabalho, elaboração de planos e estratégias de funcionamento na mesma altura do ano, etc. Como classificaria a sua receptividade para alterar algumas das formas de funcionamento da sua organização para permitir a sua compatibilização com as outras organizações da rede?

1. muito receptivo	
2. bastante receptivo	
3. moderadamente receptivo	
4. pouco receptivo	
5. nada receptivo	

33. Como classificaria a sua receptividade em aderir a uma organização em rede composta pelo conjunto de organizações a que temos estado a fazer referência?

1. muito receptivo	
2. bastante receptivo	
3. moderadamente receptivo	
4. pouco receptivo	
5. nada receptivo	

34. Se fosse criada uma rede com o conjunto das seguintes organizações que organização acha deveria assumir o papel de coordenador dessa mesma rede? (escolha apenas a organização que considera com o perfil mais adequado para desempenhar um tal papel)

- 1 — 8 — 15 — 22 — 29
- 2 — 9 — 16 — 23
- 3 — 10 — 17 — 24
- 4 — 11 — 18 — 25
- 5 — 12 — 19 — 26
- 6 — 13 — 20 — 27
- 7 — 14 — 21 — 28

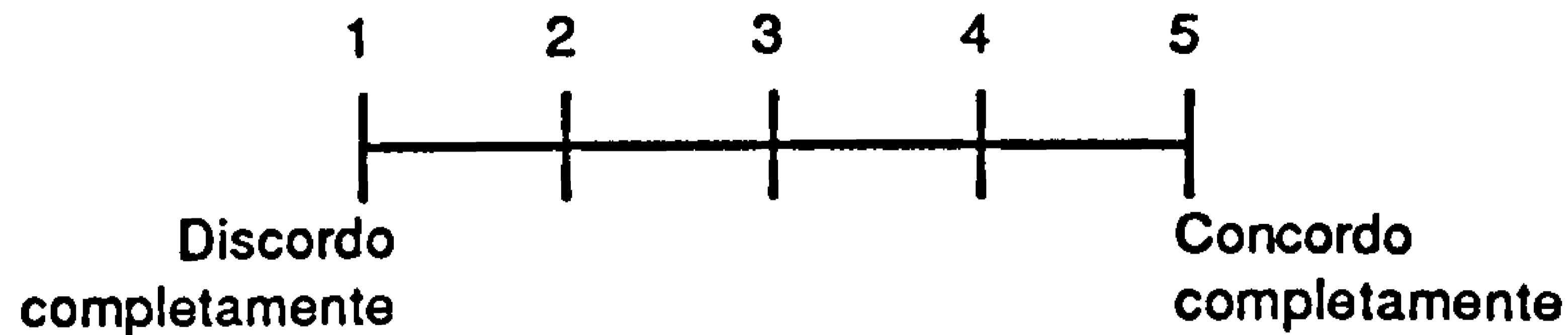
35. Qual pensa deveria ser o principal objectivo de uma rede de organizações do turismo baseada no conjunto das organizações em análise? (escolha apenas uma resposta)

<input type="checkbox"/>	nenhum
<input type="checkbox"/>	formulação de políticas e estratégias para o turismo
<input type="checkbox"/>	controle do desenvolvimento turístico
<input type="checkbox"/>	facilitar a comunicação e o diálogo entre os agentes envolvidos no turismo
<input type="checkbox"/>	outras (por favor especifique) _____
<input type="checkbox"/>	_____

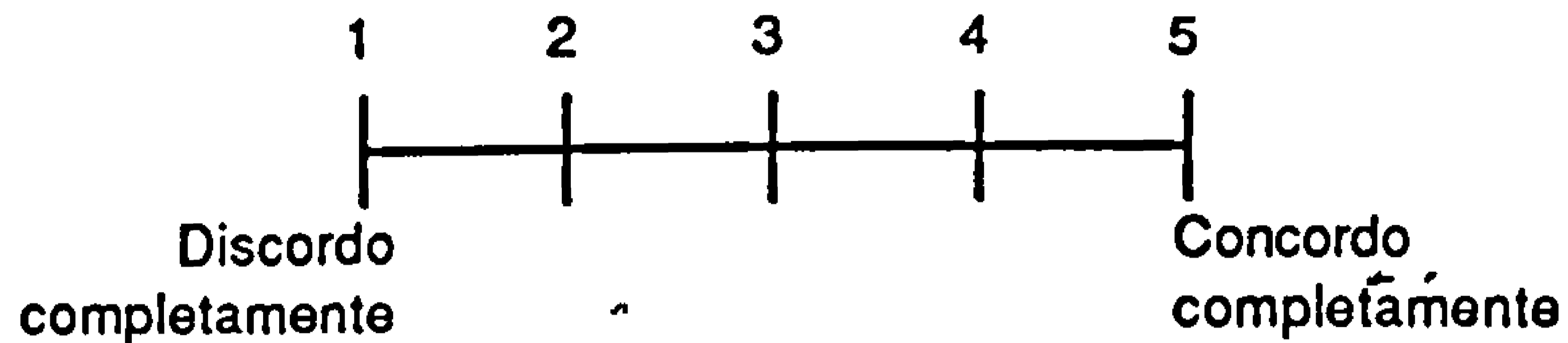
Por favor, considere as seguintes afirmações e classifique-as de acordo com a escala indicada, fazendo um circulo em torno do número referente à sua resposta. Tome em consideração a seguinte escala:

- 1 = discordo completamente
- 2 = discordo
- 3 = nem concordo nem discordo
- 4 = concordo
- 5 = concordo completamente

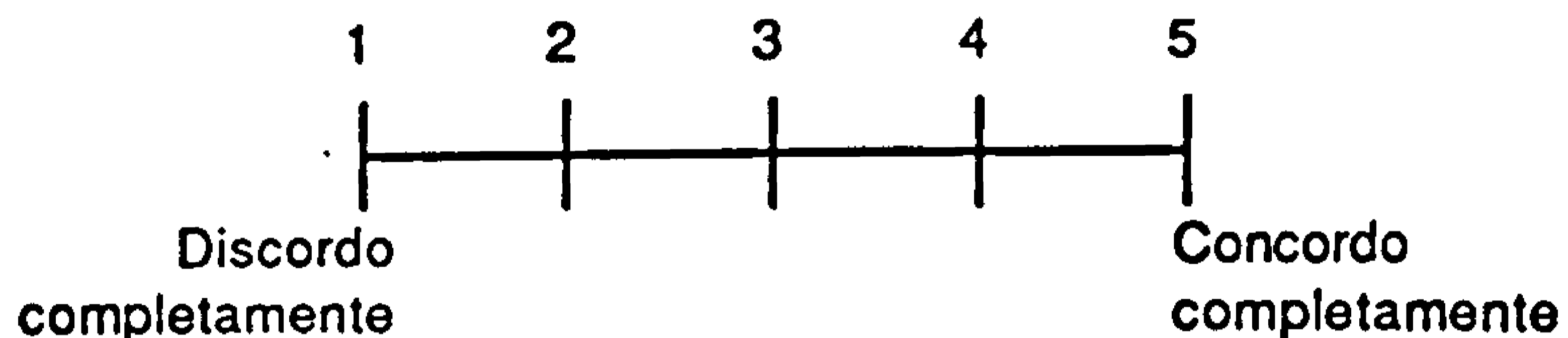
36. Organizações a trabalharem em rede são mais poderosas do que organizações a trabalharem individualmente, no sentido de, nomeadamente, conseguirem mais facilmente influenciar as políticas de turismo ao nível local, regional e nacional, terem acesso a fundos financeiros, etc.



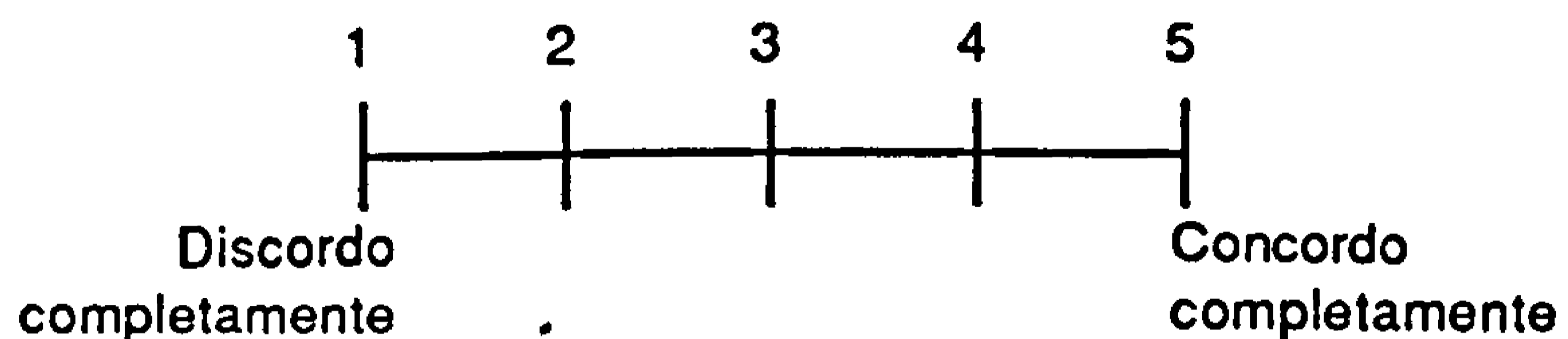
37. Organizações em rede possuem uma maior capacidade de competição no mercado do turismo do que organizações a trabalharem individualmente.



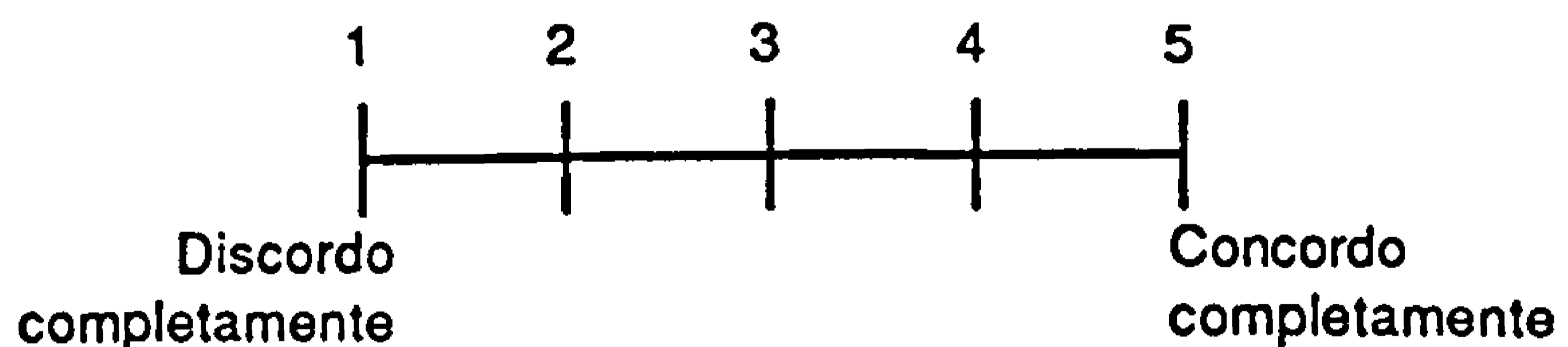
38. Organizações em rede conseguem superar melhor situações de recessão e de crise nos mercados do que organizações a trabalharem individualmente.



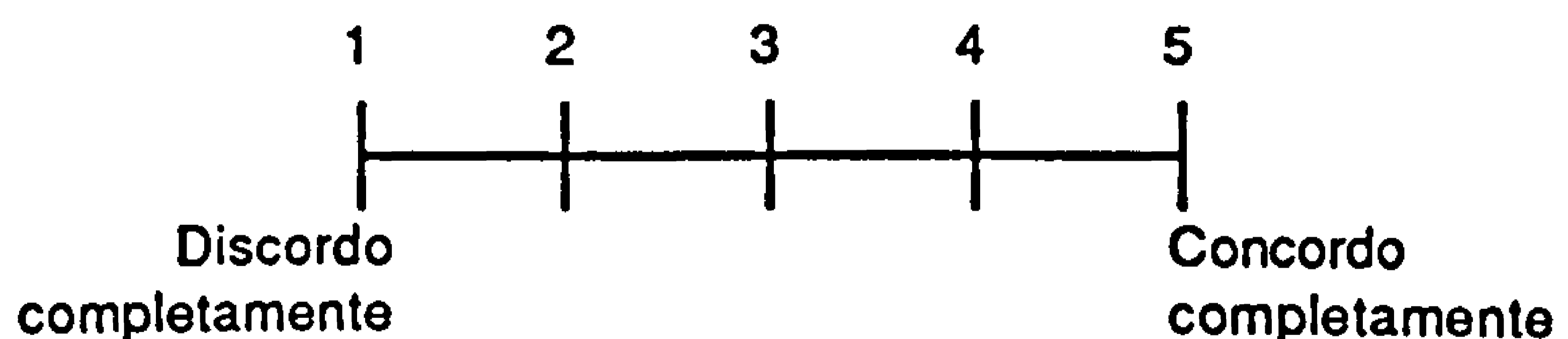
39. Se as políticas e estratégias de turismo forem preparadas numa rede de organizações em vez de individualmente pelas diferentes organizações, pode-se chegar a soluções mais ricas e a construir políticas e estratégias melhores para o turismo.



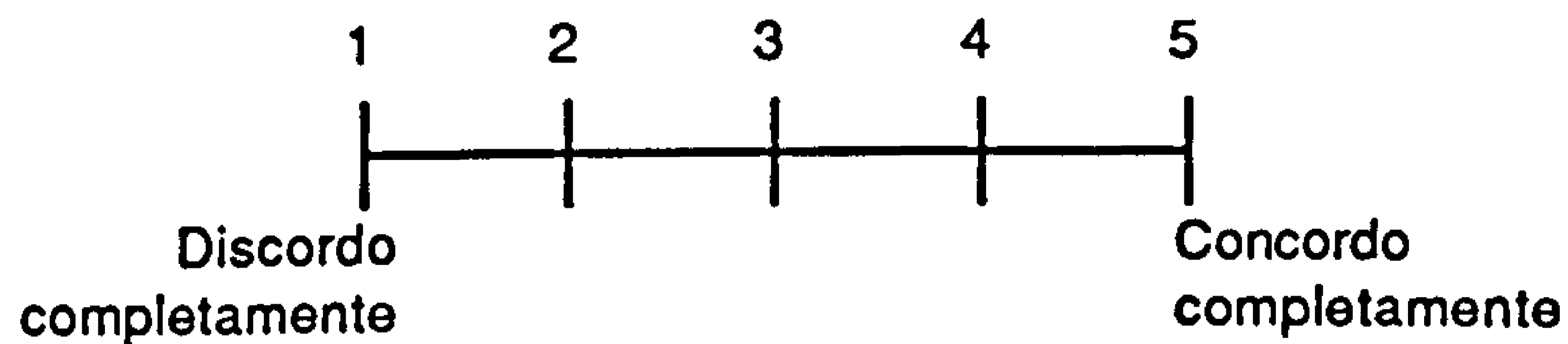
40. Os recursos regionais (turísticos, humanos, financeiros, etc) podem melhor ser geridos e distribuídos geograficamente por uma rede de organizações do que por organizações a trabalharem individualmente.



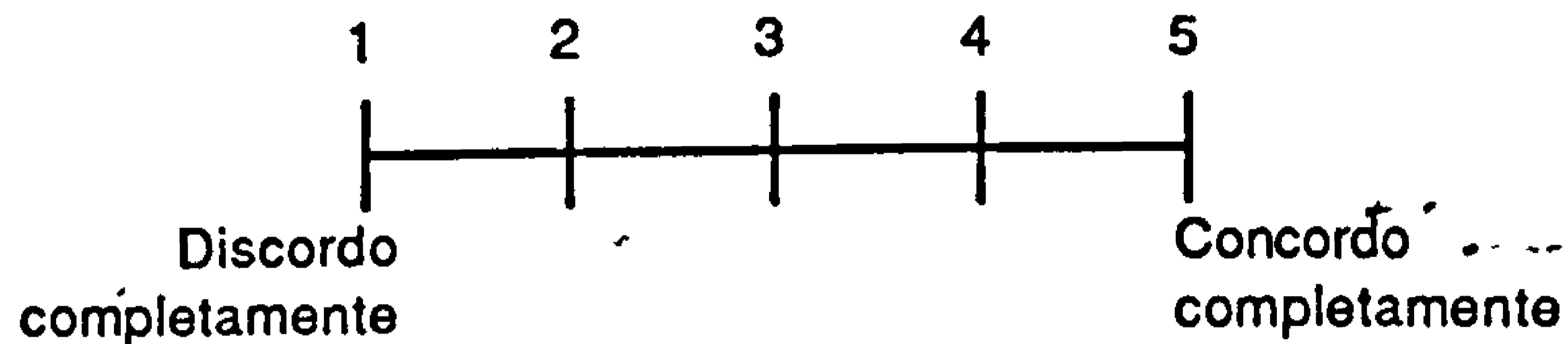
41. A eficácia, eficiência e adequação das políticas para o turismo aumenta se estas forem preparadas com o envolvimento de todas as organizações com influência na área do turismo.



42. Organizações a trabalharem em rede diminuem o funcionamento dos mecanismos de mercado na medida em que limitam o funcionamento da iniciativa privada.



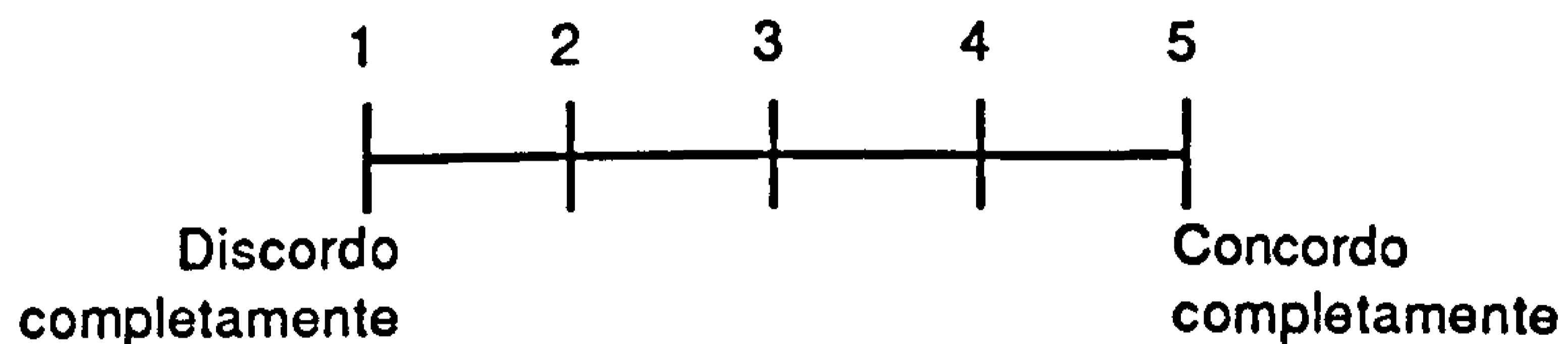
43. Se houver uma rede de organizações constituída por representantes de diversas organizações, cada uma das organizações pode individualmente preparar estratégias e políticas de acção mais eficientes dado poderem saber antecipadamente quais as estratégias dos outros agentes.



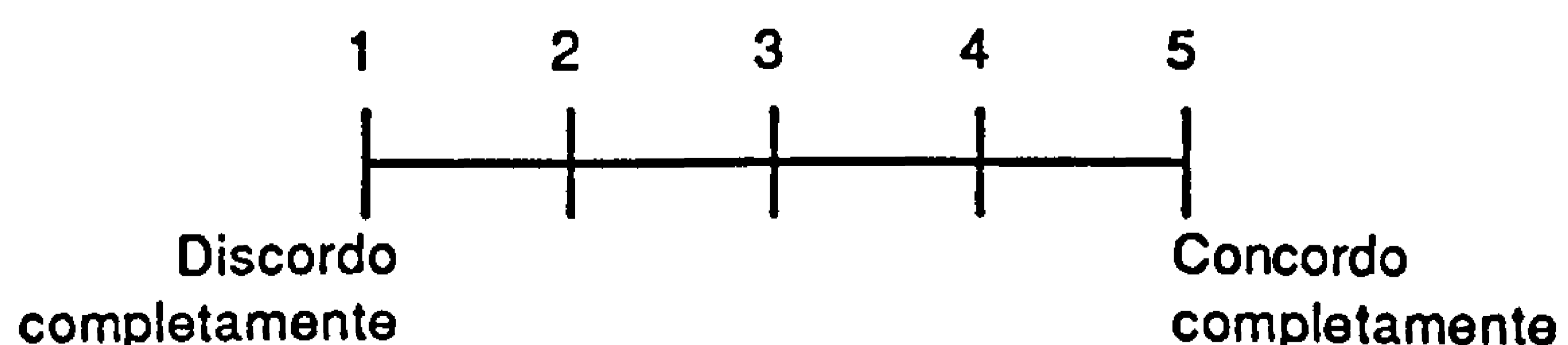
44. As organizações em rede beneficiam:

<input type="checkbox"/>	Exclusivamente as organizações do sector público
<input type="checkbox"/>	Principalmente as organizações do sector público
<input type="checkbox"/>	Tanto as organizações do sector público como do privado
<input type="checkbox"/>	Principalmente as organizações do sector privado
<input type="checkbox"/>	Exclusivamente as organizações do sector privado

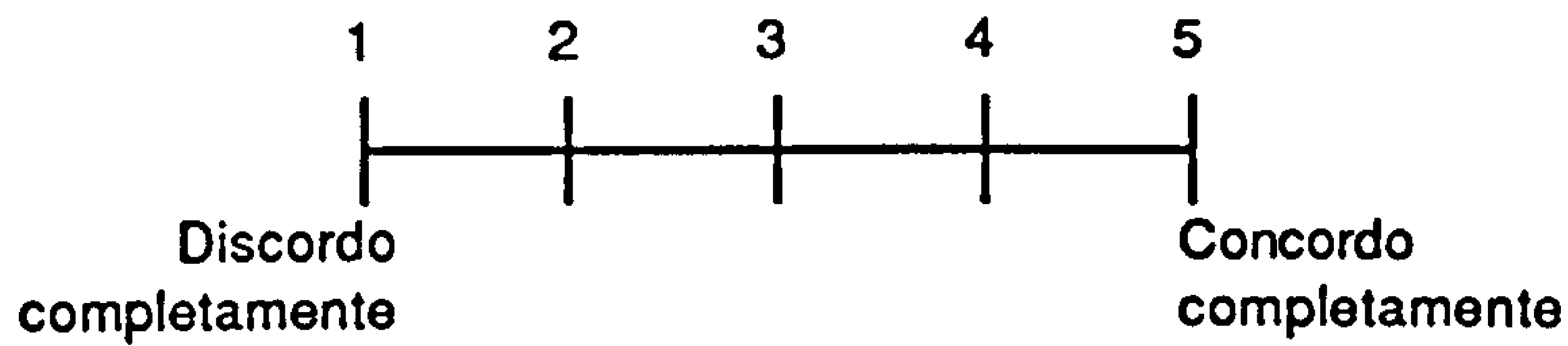
45. A importância das organizações menos influentes, tais como associações sem objectivos lucrativos (exemplo, associações culturais e de recreio), irá diminuir se estas aderirem a uma organização em rede, uma vez que estas não terão capacidade de negociar junto de outras organizações mais poderosas, tais como grupos económicos e organizações governamentais.



46. As organizações em rede conseguem dar uma melhor resposta aos desafios decorrentes de tratados internacionais, tais como os da União Europeia e do GATT, nomeadamente em termos de uma maior capacidade competitiva, acesso a mercados e financiamento externo, absorção de legislação internacional e Europeia, novas técnicas de produção e organização, maior capacidade de 'lobbying', etc.

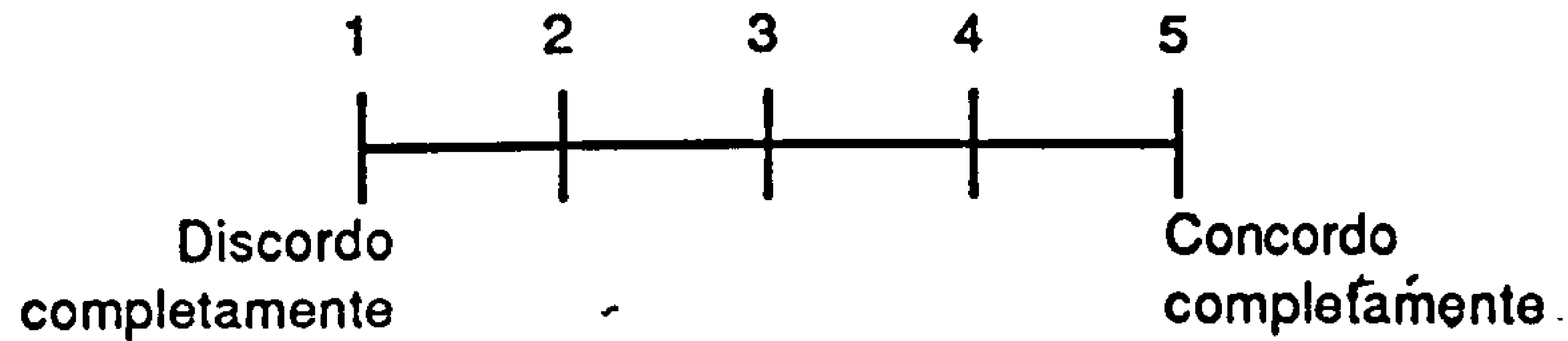


47. É provável que no futuro as organizações ligadas ao turismo comecem a evoluir para sistemas de organização em rede, de uma forma mais intensa do que tem acontecido até hoje.



48. O que pensa que pode acontecer aos diferentes pontos de vista defendidos por diferentes organizações numa rede?

(a) Podem conduzir a melhores soluções.



(b) Podem conduzir a conflitos insanáveis (sem resolução) entre os diversos parceiros.

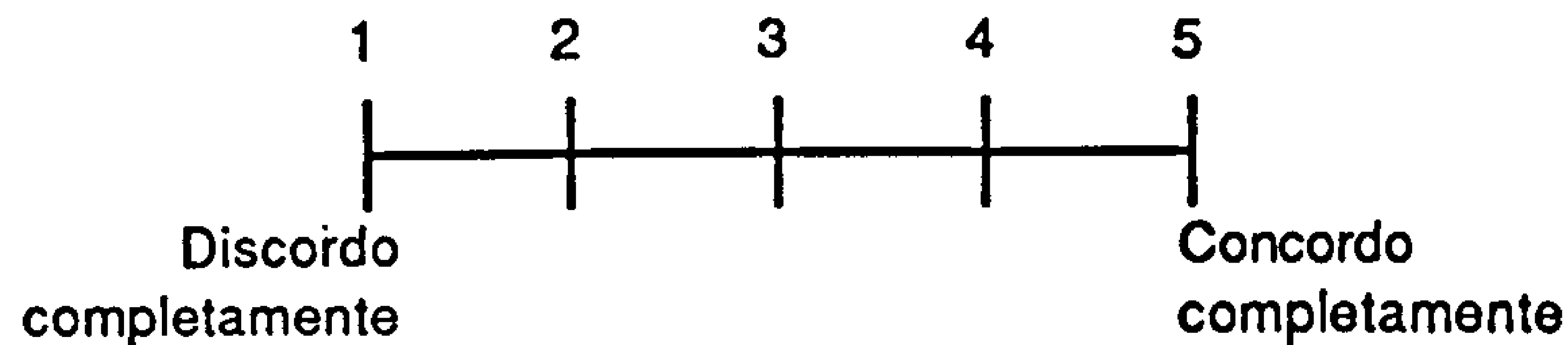


Tabela I**Organizações incluídas na
Região de Turismo da Rota da Luz**

1. Câmara Municipal de Agueda
2. Câmara Municipal de Albergaria-a-Velha
3. Câmara Municipal de Estarreja
4. Câmara Municipal de Ilhavo
5. Câmara Municipal de Oliveira de Azemeis
6. Câmara Municipal de Oliveira do Bairro
7. Câmara Municipal de Vale de Cambra
8. Câmara Municipal de Arouca
9. Câmara Municipal de Aveiro
10. Câmara Municipal de Ovar
11. Câmara Municipal de Castelo de Paiva
12. Câmara Municipal de Murtosa
13. Câmara Municipal de Sever do Vouga
14. Câmara Municipal de Vagos
15. Região de Turismo da Rota da Luz
16. Universidade de Aveiro
17. Comissão de Coordenação da Região do Norte (CCRN)
18. Comissão de Coordenação da Região do Centro (CCRC)
19. Direcção-Geral da Marinha
20. Junta Autónoma do Porto de Aveiro
21. Representante dos Estabelecimentos Hoteleiros
22. Representante dos Estabelecimentos Similares dos Hoteleiros
23. Representante das Agências de Viagens e de Turismo
24. Representante das Agências de Automóveis de Aluguer sem Condutor
25. Representante dos Parques de Campismo
26. Representante da Federação de Folclore Português
27. Representante das Organizações Sindicais das Ind. de Hotel. e Similares
28. Representante da Delegação em Aveiro do Instituto do Desporto
29. Representante do Ministério do Comércio e Turismo

Appendix II

(Interview-Questionnaire - English version)

INTERVIEW - QUESTIONNAIRE

Name of the interviewee: _____

Name of the organisation: _____

Part I

I. Role of the interviewee in the tourism board

1. representative vs. head of organisation: _____

2. elected vs. appointed by the organisation: _____

3. Spatial coverage of the organisation (e.g., national, regional or local organisation?): _____

4. Other information: _____

II. About the organisation

1. Number of employees: _____

2. Last year's budget: _____

3. Number of associates (only for associations): _____

4. For how long have you been in the tourism board as representative of your organisation?

5. Nature of the organisation (tick as appropriate)

Public (only public sector organisations)	<input type="checkbox"/>
Public/Private (the organisation includes both public and private sector organisations) (% if possible)	<input type="checkbox"/>
Private (only private sector organisations)	<input type="checkbox"/>

6. Main objective(s) of the organisation _____

7. Does the board of your organisation include representatives of other organisations?

No

Yes (Please specify which organisations) _____

8. Other information: _____

Part II

!!!! SHOW TABLE I !!!!**(Q1) Question 1**

⇒ Table I is a checklist of all organisations represented in the Regional Tourism Commission. Do you know any other organisation(s) which, due to its (their) importance for tourism, should also be represented in the Regional Tourism Commission? Please, indicate which organisation(s).

(Q2) Question 2

Please, look at Table I and say which organisations you contact as representative of your organisation (contacts can be established by telephone, telex, fax, letter, memo, reports, person-to-person, meetings or other).

(Q3) Question 3

Take into account only those organisations you contact (mentioned in question 2); please indicate how often contacts are made (Choose the best answer for each organisation).

- 1 = a few times a year
- 2 = about once a month
- 3 = about once a week
- 4 = about once a day
- 5 = almost continually
- 0 = don't know / no answer

(Q4) Question 4

What is the major reason for the contacts (consider only those organisations mentioned in Question 2)

- 1 = to request information
- 2 = to give information
- 3 = to coordinate efforts
- 4 = to settle differences
- 5 = to plan future programs
- 6 = other (please specify) _____
- 0 = don't know / no answer

(Q5) Question 5

Consider again only those organisations or representatives of organisations you contact (mentioned in question 2); please indicate why do you contact them.

- 1 = required by law
- 2 = formal agreement between agencies
- 3 = common practice / handling specific needs or problems
- 4 = other (please specify) _____
- 0 = don't know / no answer

(Q6) Question 6

How are the terms of your organisation's interaction with the other organisations reached? (please answer again only in relation to those organisations mentioned in Question 2)

The terms are set:

- 5 = Completely by them
- 4 = Mostly by them
- 3 = Mutually
- 2 = Mostly by us
- 1 = Completely by us
- 0 = don't know / no answer

(Q7) Question 7

When representatives of your organisation meet with the other organisations to discuss issues of mutual concern, how much influence does each organisation have on the decisions reached? (please consider only those organisations you contact mentioned in Question 2)

- 5 = a great deal of influence
- 4 = quite influence
- 3 = some influence
- 2 = little influence
- 1 = no influence at all
- 0 = don't know / no answer

(Q8) Question 8

Take again into account only those organisations you use to contact, mentioned in Question 2. How important are the contacts with each of these organisations to the work and objectives of your organisation?

- 5 = very important
- 4 = quite important
- 3 = moderatly important
- 2 = little important
- 1 = not important at all
- 0 = don't know / no answer

(Q9) Question 9

What is the major reason for the disagreements or disputes which emerge between your organisation and the other organisations mentioned in Question 2?

- 1 = no disagreements at all
- 2 = different viewpoints when handling specific matters
- 3 = different operating philosophies
- 4 = personality differences
- 5 = overlapping or duplication of services
- 6 = inefficiency
- 7 = differences in power
- 8 = political problems
- 9 = other (please specify) _____
- 0 = don't know / no answer

(Q10) Question 10

To what extent are the goals and the operating philosophy of the organisations you use to contact compatible with the goals and the operating philosophy of your own organisation? (please, take again into account only those organisations mentioned in Question 2).

- 5 = very compatible
- 4 = quite compatible
- 3 = moderatly compatible
- 2 = little compatible
- 1 = not compatible at all
- 0 = don't know / no answer.

(Q11) Question 11

How well are the activities of your organisation and those you contact coordinated? (Take again into account only the organisations mentioned in Question 2)

- 5 = very well coordinated
- 4 = well coordinated
- 3 = moderatly coordinated
- 2 = poorly coordinated
- 1 = not coordinated at all
- 0 = don't know / no answer

(O12) Question 12

Take now into account all organisations shown in Table I and not only those you contact, and please answer the following question.

How do you see the importance of each of the following organisations for tourism? (Please take into account the importance of the organisation independently of the way in which it performs) (Please include your own organisation in the answer)

- 5 = very important
- 4 = quite important
- 3 = moderately important
- 2 = little important
- 1 = not important at all
- 0 = don't know / no answer

Part III
Networking

!!!! Introduction: explains what it is meant by tourism network !!!!
(see chapter 8, section 8.1)

(O13) Question 13

How willing would you be to join a network based upon these organisations?

5 = very willing	
4 = quite willing	
3 = moderately willing	
2 = not very willing	
1 = not willing at all	
0 = don't know / no answer	

(O14) Question 14

The creation of a network involves the standardization of several aspects in the way in which an organisation is run, in order to facilitate the communication among all partners, such as in terms of administrative procedures, time-tables, work-schedules, etc. How willing would you be to change the way in which your organisation is run to ensure higher working compatibility?:

5 = very willing	
4 = quite willing	
3 = moderately willing	
2 = not very willing	
1 = not willing at all	
0 = don't know / no answer	

(O15) Question 15

Suppose that a network based on the following organisations is set up (see Table I). Which organisation do you believe would best fit the role of coordinator? (choose only the one you consider the most appropriate to develop this role; please include your own organisation)

(O16) Question 16

What do you think should be the main focus of the network? (please, choose only one answer)

1 = none	
2 = policy ideal-type	
3 = control ideal-type	
4 = communication ideal-type	
5 = other (please specify) _____	
0 = don't know / no answer	

Please, consider the following statements and classify them according to Table II

!!! SHOW TABLE II !!!

Q.17 - Networks have a stronger capacity to compete in the travel and tourism market.	
Q.18 - Networks respond better to situations of crisis and recession in the tourism market.	
Q.19 - When tourism policy and strategy are designed in a networking scheme, less informed solutions are brought into the decision-making and decision-taking processes.	
Q.20 - Regional resources (economic, manpower, etc) would be less well managed and allocated in a networking scheme rather than managed and allocated individually by each organisation.	
Q.21 - The efficiency, effectiveness and adequacy of tourism policy increases if it is set up with the involvement of all organisations with influence in the tourism industry.	
Q.22 - Networks negatively affect the functioning of the market because private sector organisations become more intensively tied to each other.	
Q.23 - If there is an organisation where there are representatives from different organisations, each organisation may perceive better strategies designed by other agencies, and, therefore, may set up more efficient and effective policies for his/her own organisation.	
Q.24 - The importance of less influential organisations, such as non-profit organisations (e.g., social and cultural organisations), will decrease if they join a network, since they will not have the capacity to bargain with other more powerful organisations, such as economic groups and government organisations.	
Q.25 - Networks respond better to the challenges which are brought about by supra-national agreements (e.g., EU and GATT), in terms of competitiveness, access to external markets and funding, adaptation to international legislation affecting the functioning of member-states, new organisational methods, lobbying, etc.	
Q.26 - The potential contradictions that might emerge among the different partners if they join a network might lead to better solutions.	
Q.27 - The potential contradictions that might emerge among the different partners if they join a network might lead to unsolved conflicts.	
Q.28 - It is unlikely that in future tourism organisations will evolve towards networks.	
Q.28 - Networks benefit:	
1. Exclusively public organisations	
2. Mostly public organisations	
3. Mutually public and private organisations	
4. Mostly private organisations	
5. Exclusively private organisations	
0. Don't know / no answer	

Part V

INFORMATION ABOUT THE INTERVIEWEE

1. Age :

1. less than 24 years	
2. between 25 - 34 years	
3. between 35 - 44 years	
4. between 45 - 54 years	
5. between 55 - 64 years	
6. more than 65 years	

2. Gender

Male	
Female	

3. Working place: _____

4. Place of usual residence (if different from above): _____

5. Education

1. Primary school	
2. Half of the secondary school	
3. The full secondary school	
4. Incomplete <i>Licenciatura</i> or BSc (Please, specify the course) _____	
5. Full <i>Licenciatura</i> or BSc (Please, specify the course) _____	

6. Have you ever done a course(s) in tourism?

- 1. No
 - 2. Yes (Please specify which course(s) and the place) _____
- _____
- _____
- _____

Table I**Organisations included in the
Rota da Luz Regional Tourism Board**

1. Câmara Municipal de Agueda
2. Câmara Municipal de Albergaria-a-Velha
3. Câmara Municipal de Estarreja
4. Câmara Municipal de Ilhavo
5. Câmara Municipal de Oliveira de Azemeis
6. Câmara Municipal de Oliveira do Bairro
7. Câmara Municipal de Vale de Cambra
8. Câmara Municipal de Arouca
9. Câmara Municipal de Aveiro
10. Câmara Municipal de Ovar
11. Câmara Municipal de Castelo de Paiva
12. Câmara Municipal de Murtosa
13. Câmara Municipal de Sever do Vouga
14. Câmara Municipal de Vagos
15. Região de Turismo da Rota da Luz
16. Universidade de Aveiro
17. Comissão de Coordenação da Região do Norte (CCRN)
18. Comissão de Coordenação da Região do Centro (CCRC)
19. Direcção-Geral da Marinha
20. Junta Autónoma do Porto de Aveiro
21. Representante dos Estabelecimentos Hoteleiros
22. Representante dos Estabelecimentos Similares dos Hoteleiros
23. Representante das Agências de Viagens e de Turismo
24. Representante das Agências de Automóveis de Aluguer sem Condutor
25. Representante dos Parques de Campismo
26. Representante da Federação de Folclore Português
27. Representante das Organizações Sindicais das Ind. de Hotel. e Similares
28. Representante da Delegação em Aveiro do Instituto do Desporto
29. Representante do Ministério do Comércio e Turismo

NOTE: This table comprises all the representatives included in the Rota da Luz tourism board. Similar tables were designed for the other three regions: the Algarve, the Alto Minho and the Estoril Coast.

TABLE II

3. Agree strongly
2. Agree moderatly
1. Disagree
0. Without opinion/do not know

	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	Q15
1. Câmara Municipal de Agueda												
2. Câmara Municipal de Albergaria-a-Velha												
3. Câmara Municipal de Estarreja												
4. Câmara Municipal de Ilhavo												
5. Câmara Municipal de Oliveira de Azemeis												
6. Câmara Municipal de Oliveira do Bairro												
7. Câmara Municipal de Vale de Cambra												
8. Câmara Municipal de Arouca												
9. Câmara Municipal de Aveiro												
10. Câmara Municipal de Ovar												
11. Câmara Municipal de Castelo de Paiva												
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13. Câmara Municipal de Sever do Vouga												
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20. Junta Autónoma do Porto de Aveiro												
21. Representante dos Estabelecimentos Hoteleiros												
22. Representante dos Estabelecimentos Similares dos Hoteleiros												
23. Representante das Agências de Viagens e de Turismo												
24. Representante das Agências de Automóveis de Aluguer sem Condutor												
25. Representante dos Parques de Campismo												
26. Representante da Federação de Folclore Português												
27. Representante das Organizações Sindicais das Ind. de Hotel. e Similares												
28. Representante da Delegação em Aveiro do Instituto do Desporto												
29. Representante do Ministério do Comércio e Turismo												

NOTE: This table comprises all the representatives included in the Rota da Luz tourism board. Similar tables were designed for the other three regions: the Algarve, the Alto Minho and the Estoril Coast. It was used to collect the answers provided by the interviewees

Appendix IIa

(Interview-Questionnaire - Portuguese version)

ENTREVISTA - QUESTIONÁRIO

Nome do entrevistado: _____

Organização: _____

Parte I**I. Papel do entrevistado na área do turismo**

1. Representante vs. presidente (responsável) da organização: _____

2. Eleito vs. nomeado por uma organização: _____

3. Há quanto tempo representa a organização na Região de Turismo (número de anos): _____

4. Outra informação: _____

II. Informação relativa à organização

1. Número de empregados: _____

2. Montante do orçamento do último ano (1993) (aproximado): _____

3. Área geográfica abrangida pela organização (quem representa: organização nacional, regional ou local?): _____

4. Natureza da organização (assinale com uma cruz)

<input type="checkbox"/>	Pública (a organização é constituída apenas por organismos da administração pública)
<input type="checkbox"/>	Pública/Privada (a organização é constituída por organismos da administração pública e privada) (% se possível)
<input type="checkbox"/>	Privada (a organização é constituída apenas por organismos privados)

5. Objectivos principais da organização: _____

6. Os órgãos directivos incluem representantes de outras organizações?

1. Não

2. Sim (por favor, especifique quais as organizações) _____

7. Outra informação: _____

Part II

!!! MOSTRAR TABELA I !!!**(Q1) Questão 1**

A seguinte lista de organizações (Tabela I) corresponde a todas as entidades com representação na Comissão Regional de Turismo. Considera que para além destas organizações existem outras entidades/organismos que pelo facto de possuírem uma acção directa ou indirecta na área do turismo também deveriam lá estar representadas apesar de o não estarem presentemente? Quais?

(Q2) Questão 2

Analise a seguinte lista de organizações (Tabela I) e indique aquelas que costuma contactar como representante da sua organização para a resolução de assuntos exclusivamente relacionados com o turismo (os contactos podem ser estabelecidos através do telefone, telex, fax, memorandos, relatórios, pessoalmente, reuniões, etc).

(Q3) Questão 3

Tome apenas em consideração o conjunto de organizações que indicou na questão 1. Com que frequência são estabelecidos contactos entre a sua organização e as seguintes organizações?

- 1 = algumas vezes por ano
- 2 = cerca de uma vez por mês
- 3 = cerca de uma vez por semana
- 4 = uma vez por dia
- 5 = aproximadamente permanentemente
- 0 = não sabe / não responde

(Q4) Questão 4

Qual a razão principal pela qual contacta cada uma das organizações acima indicadas?

- 1 = para pedir informações/dados
- 2 = para dar informações/dados
- 3 = para coordenar esforços e definir estratégias
- 4 = para estabelecer diferenças na actuação das organizações
- 5 = outras (por favor, indique quais) _____
- 0 = não sabe / não responde

(Q5) Questão 5

Qual a principal razão que está na base do contacto com cada uma das organizações acima indicadas?

- 1 = devido a imposições/disposições legais
- 2 = acordo estabelecido directamente com a organização
- 3 = prática habitual / em função de problemas ou necessidades específicas
- 4 = outras (por favor, indique quais) _____
- 0 = não sabe / não responde

(O6) Questão 6

Quando são (ou foram) estabelecidas relações/contactos entre a sua organização e cada uma das organizações que habitualmente contacta quem define (ou definiu) os 'timings' desses encontros?

Os 'timings' da relação são (foram) estabelecidos:

- 5 = completamente por eles
- 4 = principalmente por eles
- 3 = mutuamente
- 2 = principalmente por nós
- 1 = completamente por nós
- 0 = não sabe / não responde

(O7) Questão 7

Quando representantes da sua organização se encontram com as outras organizações para discutir assuntos de interesse mútuo, qual o grau de influência que cada uma das organizações que habitualmente contacta possui para a decisão final?

- 5 = muita influência
- 4 = bastante influência
- 3 = mais ou menos influência
- 2 = pouca influência
- 1 = nenhuma influência
- 0 = não sabe / não responde

(O8) Questão 8

Qual a importância do contacto com cada uma das organizações para o funcionamento e objectivos da sua organização?

- 5 = muito importante
- 4 = importante
- 3 = mais ou menos importante
- 2 = pouco importante
- 1 = nada importante
- 0 = não sabe / não responde

(O9) Questão 9

Qual é a principal razão das discórdias e desentendimentos entre a sua organização e cada uma das organizações que costuma contactar?

- 1 = não há desentendimentos/discórdias
- 2 = diferentes perspectivas na resolução de aspectos específicos
- 3 = diferentes formas de funcionamento
- 4 = diferenças de personalidade
- 5 = devido a haver sobreposição ou duplicação de funções
- 6 = diferenças de eficiência
- 7 = diferenças de poder
- 8 = problemas políticos
- 9 = outras (por favor indique quais) _____
- 0 = não sabe / não responde

(O10) Questão 10

De que forma é que os objectivos e a forma de funcionamento de cada uma das organizações que habitualmente contacta são compatíveis com os da sua organização?

- 5 = muito compatíveis
- 4 = bastante compatíveis
- 3 = mais ou menos compatíveis
- 2 = pouco compatíveis
- 1 = nada compatíveis
- 0 = não sabe / não responde

(Q11) Questão 11

Com que intensidade é que as actividades da sua organização são coordenadas com cada uma das organizações que habitualmente contacta?

- 5 = muito bem coordenadas
- 4 = bastante coordenadas
- 3 = mais ou menos coordenadas
- 2 = pouco coordenadas
- 1 = nada coordenadas
- 0 = não sabe / não responde

(Q12) Questão 12

Tome agora em consideração todas as organizações indicadas na Tabela I e não apenas aquelas que habitualmente contacta e responda à seguinte questão

Na sua opinião qual a importância de cada uma das seguintes organizações para o turismo (tome em consideração a importância da organização independentemente da forma como esta tem vindo a funcionar nos últimos anos)

- 5 = muito importante
- 4 = importante
- 3 = mais ou menos importante
- 2 = pouco importante
- 1 = nada importante
- 0 = não sabe / não responde

Parte III
Networking / Rede

NOTA: nesta parte do trabalho a palavra 'rede' deverá ser entendida como uma organização composta por todos os agentes com influência directa ou indirecta no turismo. Nesta organização em rede é suposto que as estratégias, políticas e orientações para o turismo regional são elaboradas em parceria por todas as organizações com assento na rede. Isto é, as propostas de política e estratégia para o turismo não são oriundas de apenas uma organização mas sim elaboradas a partir da discussão e negociação no conjunto de todas as organizações com influência directa ou indirecta no turismo.

(Q13) Questão 13

Como classificaria a sua receptividade em aderir a uma organização em rede composta pelo conjunto de todas as organizações da lista apresentada?

5. muito receptivo	
4. bastante receptivo	
3. moderadamente receptivo	
2. pouco receptivo	
1. nada receptivo	
0. não sabe / não responde	

(Q14) Questão 14

A eventual criação de uma organização em rede constituída pelo conjunto de todas as organizações, iria implicar que cada uma das organizações adaptasse alguns aspectos do seu funcionamento a uma forma 'standard', nomeadamente em termos de alguns aspectos administrativos, formas de trabalho, elaboração de planos e estratégias de funcionamento na mesma altura do ano, etc. Como classificaria a sua receptividade para alterar algumas das formas de funcionamento da sua organização para permitir a sua compatibilização com as outras organizações da rede?

5. muito receptivo	
4. bastante receptivo	
3. moderadamente receptivo	
2. pouco receptivo	
1. nada receptivo	
0. não sabe / não responde	

(Q15) Questão 15

Se fosse criada uma rede com o conjunto das seguintes organizações (Tabela I) que organização acha deveria assumir o papel de coordenador dessa mesma rede? (escolha apenas a organização que considera com o perfil mais adequado para desempenhar um tal papel. Considere a sua organização nesta resposta)

(Q16) Questão 16

Qual pensa deveria ser o principal objectivo de uma rede de organizações do turismo baseada no conjunto das organizações em análise? (escolha apenas uma resposta)

	1. nenhum
	2. formulação de políticas e estratégias para o turismo
	3. controle do desenvolvimento turístico
	4. facilitar a comunicação e o diálogo entre os agentes envolvidos no turismo
	5. outras (por favor especifique) _____
	0. Não sabe / não responde

Por favor, considere as seguintes afirmações e classifique-as de acordo com a escala indicada na Tabela II.

Q.17 - Organizações em rede possuem uma maior capacidade de competição no mercado do turismo do que organizações a trabalharem individualmente.	
Q.18 - Organizações em rede conseguem superar melhor situações de recessão e de crise nos mercados do que organizações a trabalharem individualmente.	
Q.19 - Se as políticas e estratégias de turismo forem preparadas numa rede de organizações em vez de individualmente pelas diferentes organizações, as soluções finais encontradas não serão tão ricas do que se forem preparadas individualmente por cada uma das organizações.	
Q.20 - Os recursos regionais (turísticos, humanos, financeiros, etc) serão pior geridos numa rede de organizações quando comparados com a sua gestão individual por cada uma das organizações.	
Q.21 - A eficácia, eficiência e adequação das políticas para o turismo aumenta se estas forem preparadas com o envolvimento de todas as organizações com influência na área do turismo.	
Q.22 - Organizações a trabalharem em rede diminuem o funcionamento dos mecanismos de mercado na medida em que limitam o funcionamento da iniciativa privada.	

Q.23 - Se houver uma rede de organizações constituída por representantes de diversas organizações, cada uma das organizações pode individualmente preparar estratégias e políticas de acção mais eficientes dado poderem saber antecipadamente quais as estratégias dos outros agentes.	
Q.24 - A importância das organizações menos influentes, tais como associações sem objectivos lucrativos (exemplo, associações culturais e de recreio), irá diminuir se estas aderirem a uma organização em rede, uma vez que estas não terão capacidade de negociar junto de outras organizações mais poderosas, tais como grupos económicos e organizações governamentais.	
Q.25 - As organizações em rede conseguem dar uma melhor resposta aos desafios decorrentes de tratados internacionais, tais como os da União Europeia e do GATT, nomeadamente em termos de uma maior capacidade competitiva, acesso a mercados e financiamento externo, absorção de legislação internacional e Europeia, novas técnicas de produção e organização, maior capacidade de 'lobbying', etc.	
Q.26 - Os diferentes pontos de vista defendidos por diferentes organizações numa rede podem conduzir a melhores soluções.	
Q.27 - Os diferentes pontos de vista defendidos por diferentes organizações numa rede podem conduzir a conflitos insanáveis (sem resolução) entre os diversos parceiros.	
Q.28 - É improvável que no futuro as organizações ligadas ao turismo comecem a evoluir para sistemas de organização em rede.	

Q.29 - As organizações em rede beneficiam:	
1. Exclusivamente as organizações do sector público	
2. Principalmente as organizações do sector público	
3. Tanto as organizações do sector público como do privado	
4. Principalmente as organizações do sector privado	
5. Exclusivamente as organizações do sector privado	
0. Não sabe / não responde	

PARTE IV

ENTREVISTA*Estrutura das Questões Abertas*

I. Como vê a forma de funcionamento das Regiões de Turismo actualmente?

1. Vantagens (indique as vantagens).
2. Desvantagens (indique as vantagens).
3. Outros comentários.
4. De acordo com a seguinte escala como classifica a forma como as Regiões de Turismo têm vindo a funcionar?

5. Muito bem	
4. Bem	
3. Mais ou menos	
2. Mal	
1. Muito mal	
0. Não sabe / não responde	

II. Qual a sua opinião em relação à criação de uma rede/network?

1. Vantagens (indique as vantagens).
2. Desvantagens (indique as vantagens).
3. Outros comentários.
4. De acordo com a seguinte escala como vê a possibilidade de se criar uma rede/network nesta região?

5. Muito fácil	
4. Fácil	
3. Mais ou menos fácil	
2. Difícil	
1. Muito difícil	
0. Não sabe / não responde	

III. Outra informação: _____

Parte V
INFORMAÇÃO RELATIVA AO ENTREVISTADO

1. Idade :

1. menos de 24 anos	
2. entre 25 - 34 anos	
3. entre 35 - 44 anos	
4. entre 45 - 54 anos	
5. entre 55 - 64 anos	
6. superior a 65 anos	

2. Sexo:

1. Masculino	
2. Feminino	

3. Local de trabalho: _____

4. Local de residência (se diferente do acima referido): _____

5. Habilitações académicas

1. 4 ^a Classe	
2. 9 ^o ano escolaridade (antigo 5 ^o ano liceu)	
3. 11 ^o ano de escolaridade (antigo 7 ^o ano do liceu) + 12 ^o ano	
4. Frequência Universitária ou Politécnico (Especificar o curso)	

5. Curso Universitário ou Politécnico (Especificar o curso)	

6. Já alguma vez fez algum curso em turismo?

1. Não

2. Sim (Qual e local) _____

TABELA I

1. Câmara Municipal de Agueda
2. Câmara Municipal de Albergaria-a-Velha
3. Câmara Municipal de Estarreja
4. Câmara Municipal de Ilhavo
5. Câmara Municipal de Oliveira de Azemeis
6. Câmara Municipal de Oliveira do Bairro
7. Câmara Municipal de Vale de Cambra
8. Câmara Municipal de Arouca
9. Câmara Municipal de Aveiro
10. Câmara Municipal de Ovar
11. Câmara Municipal de Castelo de Paiva
12. Câmara Municipal de Murtosa
13. Câmara Municipal de Sever do Vouga
14. Câmara Municipal de Vagos
15. Região de Turismo da Rota da Luz
16. Universidade de Aveiro
17. Comissão de Coordenação da Região do Norte (CCRN)
18. Comissão de Coordenação da Região do Centro (CCRC)
19. Direcção-Geral da Marinha
20. Junta Autónoma do Porto de Aveiro
21. Representante dos Estabelecimentos Hoteleiros
22. Representante dos Estabelecimentos Similares dos Hoteleiros
23. Representante das Agências de Viagens e de Turismo
24. Representante das Agências de Automóveis de Aluguer sem Condutor
25. Representante dos Parques de Campismo
26. Representante da Federação de Folclore Português
27. Representante das Organizações Sindicais das Ind. de Hotel. e Similares
28. Representante da Delegação em Aveiro do Instituto do Desporto
29. Representante do Ministério do Comércio e Turismo

TABELA II

3. Concordo
2. Nem concordo nem discordo
1. Discordo

0. Não sabe / não responde

	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	Q15
1. Câmara Municipal de Agueda												
2. Câmara Municipal de Albergaria-a-Velha												
3. Câmara Municipal de Estarreja												
4. Câmara Municipal de Ilhavo												
5. Câmara Municipal de Oliveira de Azemeis												
6. Câmara Municipal de Oliveira do Bairro												
7. Câmara Municipal de Vale de Cambra												
8. Câmara Municipal de Arouca												
9. Câmara Municipal de Aveiro												
10. Câmara Municipal de Ovar												
11. Câmara Municipal de Castelo de Paiva												
12. Câmara Municipal de Murtosa												
13. Câmara Municipal de Sever do Vouga												
14. Câmara Municipal de Vagos												
15. Região de Turismo da Rota da Luz												
16. Universidade de Aveiro												
17. Comissão de Coordenação da Região do Norte (CCRN)												
18. Comissão de Coordenação da Região do Centro (CCRC)												
19. Direcção-Geral da Marinha												
20. Junta Autónoma do Porto de Aveiro												
21. Representante dos Estabelecimentos Hoteleiros												
22. Representante dos Estabelecimentos Similares dos Hoteleiros												
23. Representante das Agências de Viagens e de Turismo												
24. Representante das Agências de Automóveis de Aluguer sem Condutor												
25. Representante dos Parques de Campismo												
26. Representante da Federação de Folclore Português												
27. Representante das Organizações Sindicais das Ind. de Hotel. e Similares												
28. Representante da Delegação em Aveiro do Instituto do Desporto												
29. Representante do Ministério do Comércio e Turismo												

Appendix III

(The postal questionnaire - English version)

Questionnaire to the Portuguese RTB

I. Budget of the RTB

	1990	1991	1992	1993	1994
Budget					

III. RTB staff

Observations

* All staff working in the RTB should be included in the questionnaire. The information should be broken down into the following four categories: (1) Executive Commission (include the president and the vice-presidents) - Table 1; (2) Advisory staff to the president - Table 2; (3) Information offices - Table 3; (4) Staff working in the RTB headquarters (include all staff working in the RTB headquarters such as professionals, drivers, cleaners, etc) - Table 4.

* Please, do not mention names because the following information is to be considered confidential.

* Please, use the following information when filling in the following tables.

(1) Please, use the following scale:

1. Less than 24 years old
2. Between 25 - 34 years old
3. Between 35 - 44 years old
4. Between 45 - 54 years old
5. Between 55 - 64 years old
6. Over 65 years old

(2) Delete as appropriate

(3) Please, use the following scale:

1. Primary school
2. Primary school - Half of the secondary school
3. Half of the secondary school - Full secondary school
4. BSc or *Licenciatura* (BSc + 2 years) (incomplete)
5. BSc (complete)
6. *Licenciatura* (BSc + 2 years) (complete)

(4) Please, indicate the main jobs developed by the staff (e.g., marketing, promotion, accountancy, administration, etc)

(5) Please, indicate the career of the staff (e.g., *Técnico Superior; Técnico; Técnico-Profissional; Pessoal Administrativo; Pessoal Operário; Pessoal Auxiliar* - according to the decree-law nº 247/87, 17th of June)

Observation: If necessary the following tables which are attached may be photocopied.

TABLE 1 - Executive Commission

Total	
-------	--

	Age (1)	Sex (2)	Education (3)	Contract characteristics (2)	Main jobs (4)
President		Male / Female		<i>Regime de Permanência</i> Full time / Part time <i>Regime de Não Permanência</i>	
Vice- President		Male / Female		<i>Regime de Permanência</i> Full time / Part time <i>Regime de Não Permanência</i>	
Vice- President		Male / Female		<i>Regime de Permanência</i> Full time / Part time <i>Regime de Não Permanência</i>	
Vice- President		Male / Female		<i>Regime de Permanência</i> Full time / Part time <i>Regime de Não Permanência</i>	
Vice- President		Male / Female		<i>Regime de Permanência</i> Full time / Part time <i>Regime de Não Permanência</i>	

Observation: If necessary this table may be photocopied.

TABLE 2 - Advisory staff to the President

Total	
-------	--

Career (5)	Age (1)	Sex (2)	Education (3)	Contract characteristics (2)	Main jobs (4)
		Male/ Female		Full time / Part time	
		Male/ Female		Full time / Part time	
		Male/ Female		Full time / Part time	
		Male/ Female		Full time / Part time	
		Male/ Female		Full time / Part time	
		Male/ Female		Full time / Part time	
		Male/ Female		Full time / Part time	
		Male/ Female		Full time / Part time	
		Male/ Female		Full time / Part time	
		Male/ Female		Full time / Part time	
		Male/ Female		Full time / Part time	

Observation: If necessary this table may be photocopied.

TABLE 3 - Information offices

Number of information offices (total)	
Staff working in the information offices (total)	

Career (5)	Age (1)	Sex (2)	Education (3)	Contract characteristics (2)	Main jobs (4)
		Male / Female		Full time / Part time	
		Male / Female		Full time / Part time	
		Male / Female		Full time / Part time	
		Male / Female		Full time / Part time	
		Male / Female		Full time / Part time	
		Male / Female		Full time / Part time	
		Male / Female		Full time / Part time	
		Male / Female		Full time / Part time	
		Male / Female		Full time / Part time	
		Male / Female		Full time / Part time	

Observation: If necessary this table may be photocopied.

TABLE 4 - Staff working in the RTB headquarters

Total	
-------	--

Career (5)	Age (1)	Sex (2)	Education (3)	Contract characteristics (2)	Main jobs (4)
		Male/ Female		Full time/ Part time	
		Male/ Female		Full time/ Part time	
		Male/ Female		Full time/ Part time	
		Male/ Female		Full time/ Part time	
		Male/ Female		Full time/ Part time	
		Male/ Female		Full time/ Part time	
		Male/ Female		Full time/ Part time	
		Male/ Female		Full time/ Part time	
		Male/ Female		Full time/ Part time	
		Male/ Female		Full time/ Part time	
		Male/ Female		Full time/ Part time	

Observation: If necessary this table may be photocopied.

Appendix IIIa

(The postal questionnaire - Portuguese version)

INQUÉRITO ÀS REGIÕES DE TURISMO

I. Orçamento da Região de Turismo

	1990	1991	1992	1993	1994
Orçamento					

III. Pessoal ao serviço na Região de Turismo

NOTAS

* Nas questões deverão ser incluídas todas as pessoas que exercem funções na Região de Turismo, agrupadas em 4 grupos: (1) Comissão Executiva - Tabela 1; (2) Gabinete de Apoio ao Presidente - Tabela 2; (3) Postos de Turismo - Tabela 3; (4) Pessoal ao serviço na sede da Região de Turismo - Tabela 4 (se na sede da Região de Turismo existir algum posto de Turismo, os funcionários que aí desempenhem funções devem ser incluídos no grupo daqueles que trabalham em postos de turismo, isto é, na Tabela 3).

* Não necessita de mencionar os nomes das pessoas.

* Por favor, utilize o seguinte conjunto de informações para responder a cada uma das questões colocadas.

(1) Utilize a seguinte escala:

1. Menos de 24 anos
2. Entre 25 - 34 anos
3. Entre 35 - 44 anos
4. Entre 45 - 54 anos
5. Entre 55 - 64 anos
6. Superior a 65 anos

(2) Riscar o que não interessa

(3) Utilize a seguinte escala:

1. 4ª classe
2. 4ª classe - 9º ano unificado (artigo 5º ano do liceu)
3. 9º ano unificado (antigo 5º ano do liceu) - 11º ou 12º anos unificado (antigo 7º ano do liceu)
4. Frequência Universitária ou do Ensino Politécnico (cursos incompletos)
5. Bacharelato (completo)
6. Licenciatura (completa)

(4) Indique, de uma forma resumida, quais as principais tarefas/funções habitualmente desempenhadas pelo funcionário (exemplo: marketing, promoção, contabilidade, administração, etc)

(5) Indique qual a categoria do funcionário (exemplo: Técnico Superior; Técnico; Técnico-Profissional; Pessoal Administrativo; Pessoal Operário; Pessoal Auxiliar - de acordo com o Decreto-Lei nº 247/87 de 17 Junho)

NOTA: Por favor, fotocopie as tabelas apresentadas de seguida caso o número de células não seja suficiente face ao número total de funcionários a indicar.

TABELA 1 - Pessoal dirigente na Região de TurismoNúmero total de pessoas

	Idade (1)	Sexo (2)	Habilitações literárias (3)	Regime de trabalho (2)	Funções que desempenha/'pelouros' (4)
Presidente		Masc. / Femin.		Regime de Permanência tempo inteiro / tempo parcial Regime de Não Permanência	
Vogal		Masc. / Femin.		Regime de Permanência tempo inteiro / tempo parcial Regime de Não Permanência	
Vogal		Masc. / Femin.		Regime de Permanência tempo inteiro / tempo parcial Regime de Não Permanência	
Vogal		Masc. / Femin.		Regime de Permanência tempo inteiro / tempo parcial Regime de Não Permanência	
Vogal		Masc. / Femin.		Regime de Permanência tempo inteiro / tempo parcial Regime de Não Permanência	

TABELA 2 - Pessoal a exercer funções no Gabinete de Apoio ao Presidente da Região de Turismo

Número total de pessoas	
-------------------------	--

Categoria (5)	Idade (1)	Sexo (2)	Habilitações literárias (3)	Regime de trabalho (2)	Funções que desempenha (4)
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	

NOTA: Por favor, fotocopie esta tabela caso o número de células não seja suficiente face ao número total de funcionários a indicar

TABELA 3 - Pessoal a exercer funções nos Postos de Turismo

Número total de postos de turismo	
Número total de funcionários a trabalharem nos postos de turismo	

Categoria (5)	Idade (1)	Sexo (2)	Habilitações literárias (3)	Regime de trabalho (2)	Funções que desempenha (4)
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	

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NOTA: Por favor, fotocopie esta tabela caso o número de células não seja suficiente face ao número total de funcionários a indicar.

TABELA 4 - Pessoal ao serviço na sede da Região de Turismo

Número total de funcionários

Categoria (5)	Idade (1)	Sexo (2)	Habilitações literárias (3)	Regime de trabalho (2)	Funções que desempenha (4)
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	
		Masc. / Femin.		tempo inteiro / tempo parcial	

NOTA: Por favor, fotocopie esta tabela caso o número de células não seja suficiente face ao número total de funcionários a indicar.