

North-South Co-operation on Tourism

A Mapping Study

by [Ciaran O' Maolin](#) 14 June 2000

This document was completed on 14 June 2000 for the CCBS Study Group meeting on 22 June. If you would like to notify us of corrections or additional information please e-mail patricia.clarke@gub.ac.uk as soon as possible. Changes that have been made since 14 June are indicated in the text by this symbol: ###

The purpose of any CCBS mapping study is to identify instances where cross border co-operation is working well, and others where it has not worked as well as it might have. It should be read as a quasi-journalistic exercise in constructive criticism, aimed at informing and provoking debate, rather than as a research report meeting the highest standards of academic rigour and objectivity. The author will be happy to correct any errors of fact, and trusts that readers will interpret explicit or implied criticism in the spirit in which it is intended: the fundamental assumption behind the Centre is that mutually beneficial cross border co-operation is to be encouraged, and where apparently negative assessments are made of particular initiatives this may be due to the requirement for the study to highlight areas that seem to need further attention, or simply to insufficiency of data.

We are aware that some conclusions of the mapping study are somewhat controversial; in particular, representatives of the two Tourist Boards disagree with parts of what we gave said about relations between the two Boards and about statistical matters. If we receive substantive responses we will either amend our text or insert links to statements from the Boards. Nevertheless, the Centre stands by the mapping study as representing the view it formed of cross border co-operation in tourism and related fields during a period of research in early 2000.

This mapping study deals with North-South co-operation in the tourism and hospitality industries in Ireland. This document is intended to provide general information on co-operation in tourism and related areas between the two Irish jurisdictions. It deals only in passing with East-West co-operation, that is, work involving the United Kingdom and the Republic of Ireland. It was prepared over a short period to assist the work of the Centre's Study Group on Tourism; it is not a definitive study of the field and there may be significant errors and omissions. The author would be grateful if readers would draw any such errors and omissions to his attention.

The study is arranged in the following sections (click on headings to move to the section):

INTRODUCTION

- *tourism in Ireland*
- *statistics*

GOVERNMENTAL

- *administrative structures*
- *ministerial meetings*
- *departmental contacts*
- *European Union matters*

TOURIST BOARD CO-OPERATION

- *Bord Fáilte (BFÉ), the Northern Ireland Tourist Board (NITB) and the British Tourist Authority (BTA)*
- *comparing the statutory and regulatory regimes*
- *marketing South-North and North-South*
- *Tourism Brand Ireland*
- *Overseas Tourism Marketing Initiative*
- *the new cross border company*
- *the Tourism Marketing Partnership*
- *web services*
- *Gulliver*

EDUCATION

- *tourism and hospitality training*
- *research centres*
- *research and education funding and co-ordination*

INDUSTRY ORGANISATIONS

- *industry groups in Ireland*
- *work at European level*
- *language-based tourism*

CROSS-BORDER INITIATIVES

- *Co-operation Ireland*
- *IFI*
- *LEADER*
- *INTERREG and ERDF*
- *EUSSPPR*
- *Future co-operation on EU funding*
- *Waterways Ireland*
- *sectoral and local initiatives*

INTRODUCTION

- *tourism in Ireland*
- *statistics*

Tourism in Ireland

For the purposes of this study we have concentrated on the marketing of the island of Ireland as a destination for holiday visitors, and on provision of holiday tourism facilities within Ireland. In terms of the economy, however, the term tourism is usually defined more broadly, as including non-holiday visits lasting more than a day (i.e. visits to friends and relatives, business trips and other visits), and as embracing ten main sectors: hotels, approved accommodation, restaurants, the licensed trade, catering, travel and transport, heritage and cultural centres, tourist information services, visitor attractions, and leisure and recreation. Transport will be the subject of a future CCBS study but the other matters are referred to below, with the emphasis on the sectors closest to holiday tourism and most relevant to North-South co-operation.

A general point that needs to be made even in the context of a preliminary mapping study is that this industry is vastly under-resourced in terms of [research](#). It is difficult to conceive of any other industry with an annual turnover in excess of £2bn functioning with so little research and development backup in the universities. We have tried to draw on published and unpublished research for this study but our impression is that very little academic work is being done, especially on North-South matters. The main official sources of tourism statistics—the respective tourist boards—do not go out of their way to facilitate external analysis of their data, and do not always publish data in the same format; statistics offered by the boards are sometimes significantly at variance with those cited by the official statistical agencies, industry organisations and ministerial speeches, for example. In those circumstances this mapping study has had to draw on a very wide range of secondary sources and telephone research, and it is by no means comprehensive.

There are several references in the text to North-South institutions which were in suspension at the time the study was being prepared. Their restoration was expected the day after completion of the draft but since it will be some time before they are fully operational the references have been allowed to stand.

Tourism in the Republic

The tourist industry in the South has expanded enormously in recent years, with visits from overseas increasing from 1.9 million in 1986 to about 5.7m in 1998. (The government's current objective is to increase that to 8m by 2005.) This growth can be attributed to a range of factors, including government policy, and capital investment by the private sector, the state and the EU in improving accessibility, infrastructure and product. The Republic has also benefited from its image as a green, nuclear-free and relatively non-industrial country, and, relative to the North, from the near absence of political violence. The current strategic objectives for tourism, supported by the [National Development Plan](#) (NDP), include an increase in spend-per-head across a longer season, a rationalisation and expansion of the marketing effort, and focused tourism development to help the regions. The NDP envisages an investment of IR£350 million over seven years, including £150m in a Multi-annual Tourism Marketing Fund and £100m each for training and product development.

It is widely assumed that the scaling down of the conflict in the North will make the whole island more attractive to the international holiday market, and will thus benefit the Republic. From the outset it should be said that many in the industry have mixed feelings about the prospect of a "peace dividend" in tourism. For the South, the relative peace now obtaining in the North could have a negative impact at least in the early years, in that the most likely scenario is that, should the North become more attractive, people will combine shorter stays in the Southern market with forays across the border. The only way that both parts of the island will benefit is if there is a dramatic increase in overall visitor numbers, and/or in spend per visitor. The latter issue is particularly problematic in that spend per visitor has not increased at the same rate as raw numbers; in other words, the vast marketing effort over the past 15 years has generated volume rather than value. Curiously, the [EFL](#) (English language learning holidays) sector, which has a much higher spend-per-head than most other market segments, has only recently begun to receive significant state aid.

The Republic's border region has not benefited proportionately from the tourism boom of the past decades, much of which was attributable to growth in Dublin city breaks. The border areas have a much shorter holiday season, and this is also a severely limiting factor in Northern Ireland.

Tourism in the North

The overall picture in Northern Ireland, as one might expect given the recent history of the region, is that tourism stagnated through the Troubles and is very underdeveloped by

comparison with the South. Total visitor numbers are a fairly crude measure but it is instructive to note that the total number of staying visitors from outside the jurisdiction in 1967 was 1.1 million (8.7m visitor-nights, a figure never since surpassed), and in 1997 there were 1.4m visitors (staying 7.5m nights). Over the past 15 years, while the South has tripled its visitor numbers, the North has not even doubled them. There are now 11 times as many tourists visiting the South as the North.

The potential for peace to contribute to growth in tourism was amply demonstrated by the 65 per cent surge in visitor numbers in 1995, following the first ceasefires. The market was quite unprepared and, notwithstanding an equally sudden decline after the resumption of hostilities, there was extensive investment leading to a 25 per cent increase in bedspaces over the next three years.

In strategic terms, the main options for the North are to try to market itself out of the legacy of the Troubles on its own (tying in with British marketing), or to link into island-wide marketing. The first option could seek to exploit the relatively "unspoilt" nature of the North, and its novelty value as a holiday destination, whereas the second would capitalise on the fact that for most overseas markets "Ireland" is initially perceived as a single destination by potential visitors, even if those who go so far as to book a holiday have, in the main, preferred to visit the Southern part while the Troubles were at their height.

For the North, certainly, the near-cessation of paramilitary activity and a reduction in overt security measures remove the single greatest obstacle to development, but the political situation is unstable, there is at the time of writing no devolved administration driving tourism forward, and internationally the region is still associated with negative images of conflict and confrontation. Sporadic violence is likely to recur for some years, along with headline-grabbing disputes over marches often coinciding with the peak holiday season. Thus the "peace dividend" could elude the North as well as the Republic.

In the event of the revival of effective North-South institutions, the logical prospect of an eventual merger of the two tourist boards, or the evolution of the planned joint company into a North-South implementation body (which, given the limited residual functions of Bord Fáilte, would amount to the same thing), gives rise to concern among staff about the relocation or loss of jobs that might accompany such a rationalisation. In the course of our preliminary research we encountered no-one in either board who was particularly enthusiastic about merging. There are also, of course, political objections to all-Ireland bodies of any kind, and it is only to be expected that these will be shared by some people in both agencies.

The industry in the North recognises the urgent need to address quality issues and to that end an Action for Tourism 2000 Taskforce has been created, chaired by NITB chief Roy Bailie and including six other industry leaders. A recent survey by BDO Stoy Hayward found that 75 per cent of Northern hoteliers were optimistic about the future for the industry in the region, subject to the continuation of the peace process.

A final general point is that the development of the industry in the North is by no means to be predicated on simply replicating what has been done in the South. Mistakes were undoubtedly made in the South's boom years, not least in the development of facilities. One need only cite the fiasco at Mullaghmore, in Co. Clare, where a heritage centre first proposed in 1991 was refused planning approval in March 2000 after a campaign by a local environmental [action group](#). The North would also need to address the spend-per-visit issue more effectively than the South has done.

Statistics

Republic

The number of *overseas* visits to the Republic in 1998 was estimated (by the [CSO](#)) at 5.7 million, of which 54 per cent (3.1m) were visits of more than a day by tourists ("pure holiday makers" as opposed to business trips, "VFR"—visits to friends and relatives, and other visits; the "tourist" classification changed from 1999 to "holiday/leisure/recreation"). This produced an estimated expenditure (including fare receipts by Irish carriers) of IR£2.3 billion. The average length of stay by all overseas visitors was 8.1 nights, and by holiday visitors 8.0 nights. (The 1999 estimates are around 6 million visitors, and over £2.5 billion income.)

Overseas visitors exclude, of course, arrivals by land, air or water from Northern Ireland. Visits from the North were counted separately, and only if they involved rail or scheduled bus travel; these amounted to only 222,000 visits of more than one day. This vastly understates the actual number of North-to-South holidaymakers since a large proportion travel by road.

Tourism's contribution to GNP was 6.2 per cent in 1996 (1988: 5.4%), although this has probably fallen back slightly as other sectors have grown. In 1996 tourism was reported to provide 188,068 jobs (82% permanent), in 15,000 businesses (the basis of this calculation is not universally accepted and in March 2000 the Minister cited a figure of 135,000). By some estimates employment in the industry almost doubled during the 1990s, and there is now a significant labour shortage. Over the last decade, visitor numbers have more than doubled. The key markets in 1996 were Great Britain (2.59 million), North America (729,000), and Germany (339,000).

At least 24 of the top holiday attractions in the Republic had visitor numbers of 100,000 or above, the largest figure being 896,475 for the National Gallery in Dublin. (Bord Fáilte advises that these figures may not be comprehensive since they depend on voluntary statistical returns.)

The Republic currently has some 1,250 hotels and guesthouses, providing 36,300 bedrooms—as against 24,000 in 1995.

Northern Ireland

The official statistics for Northern Ireland give a "headline" figure for all visitors, not for overseas visitors—i.e. including an estimate of cross border visitors. Omitting estimated cross border traffic gives a figure of under 1.1m overseas visits for 1997, but barely 20 per cent of these (218,000) were visits of more than one day by "pure holiday makers". The average length of stay by all visitors was 5.3 nights, but for holiday visitors only 4.5 nights. The numbers of holiday visitors increased markedly during 1998 and 1999, with early estimates for 1999 suggesting that the figure had exceeded 300,000.

Tourism revenue from all overseas visitors was £181m in 1997, with an additional £27m from Southern visitors and £60m from domestic holiday spending. The combined revenue accounted for approximately 1.8% of 1997 GDP, and provided around 12,500 jobs. (Howard Hastings, president of the Northern Ireland Hotels Federation, has recently suggested that up to 18,000 new jobs could be created in the sector over the next three years, if the peace holds.) The key overseas market in 1997 was Great Britain (799,000); Europe and North America each contributed about 100,000 visitors. The Irish Republic provided about 345,000 visitors. The Republic accounted for 24 per cent of all visitors and Scotland for 15 per cent, but in terms of bed-nights and revenue they contributed almost identical shares (1.1m, £27m and 1m, £26m respectively).

Only 13 of the top holiday attractions in Northern Ireland had visitor numbers of 100,000 or above, the largest figure being 379,000 for the Giant's Causeway Visitor Centre. As in the Republic, there is a very uneven regional distribution of revenue; in 1997 Belfast had around 23 per cent of the total tourist spend, Coleraine borough 13%, Fermanagh 6.3%, and most of the other 23 districts had less than 3%.

Hotels and guesthouses numbered 296 and had 5,700 bedrooms available in 1997.

[back to contents](#)

GOVERNMENTAL

- *administrative structures*
- *ministerial meetings*
- *departmental contacts*
- *European Union matters*

Administrative structures

Republic

The lead department in the South is the [Department of Tourism, Sport and Recreation](#), created in a reorganisation of portfolios in July 1997 and having Dr James McDaid as Minister. Several other departments have relevant roles relating to, for example, agritourism, the Gaeltacht and islands, educational holidays, heritage and culture. After many decades in which Irish governments took little interest in tourism planning and policy, its economic importance and potential was recognised in the late 1980s, since when the approach has been relatively interventionist. The change of tack was partly attributable to pressure from within the industry, notably from the [Irish Hotels Federation](#) and, after 1984, from the broader-based Irish Tourist Industry (ITIC). These groupings were clear that substantial state support was needed for improvements in infrastructure and marketing, and the formation of the ITIC gave greater cohesion to that vision and a considerable boost to the industry's lobbying power. The availability of European funding was perhaps the crucial factor. Two EU-backed plans, as noted below, provided a huge boost to the industry during the 1990s.

The state agency for tourism is [Bord Fáilte Éireann](#), the Irish Tourist Board, usually referred to as Bord Fáilte or within the industry as BFÉ. Operating under the Tourism Traffic Acts 1931-1998, and formerly involved in direct regulation of the industry, it was restructured in 1995 and is now responsible for development and marketing, with inspection and grading being contracted out to sectoral agencies. It has a staff complement of 239.

Seven [Regional Tourism Organisations](#) (RTOs) provide a network of information offices throughout the country, and a wide variety of industry groupings are consulted by and co-operate with the Department, Bord Fáilte and the regional bodies. While the RTOs are now well established, there was some initial resistance to the marginalisation of more local bodies such as county tourism committees, particularly in counties on the periphery of the new regions or, as in the case of Offaly, which were bisected by the RTO boundaries. This parallels the experience in Northern Ireland where some of the 26 district councils are resisting the imposition of an RTO structure.

Northern Ireland

The lead department, succeeding the Department of Economic Development (DED), is the new [Department for Enterprise, Trade and Investment](#) (DETI); the responsible Minister in the (currently suspended) Northern Ireland Executive is Sir Reg Empey, with Adam Ingram

covering the brief at the NIO in the interim. Some tourism-related responsibilities lie with the [Department of Culture, Arts and Leisure](#) (DCAL), including the central administration of arts and culture, museums, libraries, sport and leisure, visitor amenities, inland waterways, inland fisheries, millennium events and the Northern Ireland Events Company. As in the South, certain other departments, such as [Agriculture](#) and [Regional Development](#), have specialist roles in other tourism-related areas. While the approach has always been interventionist, the transition out of three decades of armed conflict has given a new emphasis to tourism development as a vehicle for economic regeneration.

The main state agency is the [Northern Ireland Tourist Board](#) (NITB), which retains the regulatory role in addition to responsibility for marketing, research and development. The Board has a staff of approximately 135. The [British Tourist Authority](#) (BTA) has a role in assisting the NITB to promote the region in the context of UK tourism marketing.

There are a number of regional and sectoral tourism marketing consortia, which the Board is striving to rationalise from the 11 active in 1999 to about five. Moreover, each of the 26 district councils is involved in marketing its own area and running tourist information centres, leisure facilities and visitor attractions. There are various industry groupings and marketing collectives, including an emerging Tourist Industry Confederation modelled on the Southern one, and a Marketing Advisory Group intended to act as a means of communication between the private sector and the NITB. However parts of the industry, including the incoming tour sector and the English language teaching sector in particular, are very underdeveloped in comparison to the South. As in the South, some other Departments have responsibilities in relation to agritourism and community-based tourism initiatives. The NITB has close relations with the English, Scottish and Welsh tourism agencies mainly through the BTA.

Ministerial meetings

We have sparse information on meetings between the respective ministers responsible for tourism in the four years prior to devolution; both also had trade responsibilities and it is likely that tourism was not at the top of the agenda. However, Baroness Denton, Economy Minister in the Northern Ireland Office (1995-97), and the Republic's Minister for Tourism and Trade (1994-97), Enda Kenny, met on 15 February 1996; at a joint North-South Trade and Investment Conference in Pittsburgh on 7 October; in Dublin on 11 November; in New York on 15 November, and at the context of the Anglo-Irish Intergovernmental Conference meeting held in Dublin on 12 March 1997. The last meeting welcomed the recent launch of the [Tourism Brand Ireland](#) marketing campaign and agreed that "the relevant ministers, together with their respective departments and agencies, would continue to examine possibilities for building on existing co-operation in the future".

Two developments later in 1997 were less conducive to optimism about North-South co-operation. In April 1997, Minister Kenny made controversial remarks on radio about Southern participation in the launch of Féile an Phobail, a West Belfast community festival. Following a general election, he was succeeded in office (in a restructured Department) by the present Minister, Dr Jim McDaid, who promptly antagonised his opposite number in the Northern Ireland Office, Economy Minister Adam Ingram, by unilaterally ordering the resurrection of the Bord Fáilte shamrock emblem in place of the new island-wide logo that had been adopted for the Tourism Brand Ireland campaign. Although it is not suggested that the spat over the logo led to a serious rift, we understand that there was extensive and sometimes lively correspondence about the matter, and that it was discussed at a meeting between Ingram and McDaid in Chicago on 6 October and again in Belfast on 9 November 1997. There were no further bilateral meetings between the respective ministers until the establishment of the devolved Executive in 1999.

During his brief (initial) tenure as Northern Ireland's Minister for Enterprise, Trade and Investment, the portfolio which covers tourism, Sir Reg Empey met two of the Republic's three Ministers with responsibilities corresponding to his own: Tánaiste Mary Harney and Public Enterprise Minister Mary O'Rourke. He was to have met the Minister for Tourism, Sport and Recreation, Jim McDaid, early in 2000 but no meeting took place before the suspension of the devolved administration. Dr McDaid told the Dáil in March that he had been "looking forward to meeting my colleague... There is much co-operation between the industry north and south... There has been excellent co-operation between officials."

The two ministers had, of course, met in the December 1999 inaugural plenary session of the North South Ministerial Conference (NSMC), but the suspension of the devolved Northern institutions intervened before a planned meeting of the NSMC "in tourism format", i.e. involving the respective ministers and addressing that topic, could be convened.

Shortly after the establishment of the Northern Ireland Executive Michael McGimpsey, as Minister in the the [Department of Culture, Arts and Leisure](#) (DCAL), paid an official visit to Dublin where on 17 January 2000 he met with Síle De Valera, his counterpart in the [Department for Arts, Heritage, the Gaeltacht and the Islands](#). They discussed North-South co-operation in a number of tourism-related areas within their respective portfolios, which included responsibility for the Shannon-Erne waterways link and cultural institutions. They also attended a meeting of the Arts Councils of the two jurisdictions.

Departmental contacts

Ad hoc contacts among senior officials in the respective lead departments (and, of course, the tourist boards) have, we are assured, been very frequent over the years, but perhaps surprisingly there has never been a formal consultative or liaison structure to deal with 'the big picture' on tourism matters. A Shannon-Erne Joint Co-ordinating Committee oversaw the development of that waterway; it has now been superseded in a legal sense by the cross border implementation body, [Waterways Ireland](#), but continues to meet while the new entity is bedded in. There is also a specialist joint committee, with representation from the departments, to deal with [International Fund for Ireland](#) matters including its extensive tourism grants programme.

Outside the lead departments other mechanisms exist to exchange information on matters with a bearing on tourism. There is, for example, a Cross-Border [Steering Group on Rural Development](#) in which the respective Agriculture departments have discussions on agritourism among many other issues.

European Union matters

The island of Ireland is a classic case of a peripheral region, and as such has benefited considerably from the European Union's development drive based on reducing economic disparities between core and periphery. Although there is very little theoretical research on how tourism impacts on peripherality in Europe, the 1990s saw a very large investment of EU structural funding in the development of tourism in the Republic, with approximately IR£200 million provided through two EU Operational Programmes for Tourism (matched from national resources: £125m from the private sector and £60m from government). Some three-quarters of this was for product development, with the remainder divided equally between training and marketing. This had a huge impact on the industry and by end-1999 the

Republic had met or exceeded the EU's targets for job creation and foreign exchange earnings from tourism.

Such large-scale European funding will not be available in the context of EU enlargement. Significant EU funding is, however, still making an impact through a number of funding mechanisms discussed [below](#), including LEADER, INTERREG and the EUSPPR. Several of the new cross border implementation bodies will deal with future programmes which could impact on tourism, and this is also discussed [below](#).

TOURIST BOARD CO-OPERATION

- *Bord Fáilte (BFÉ), the Northern Ireland Tourist Board (NITB) and the British Tourist Authority (BTA)*
- *comparing the statutory and regulatory regimes*
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Bord Fáilte (BFÉ), the Northern Ireland Tourist Board (NITB) and the British Tourist Authority (BTA)

There has been a degree of co-operation at operational level between Bord Fáilte and the Northern Ireland Tourist Board since the 1960s, initially focussing on such matters as ensuring compatibility in the regulatory regimes. More recently there has been an increasing degree of collaboration in relation to overseas marketing, staff training and tourism product development, and this has been facilitated by financial assistance from the European Union and the International Fund for Ireland.

The BFÉ-NITB relationship

The key obstacle to co-operative marketing has always been that BFÉ and the NITB are competitors. Notwithstanding the global perception of "Ireland" as a single destination, BFÉ as a state-funded body has the fundamental role of increasing the value of tourism in the Republic's GNP. The Northern Ireland Tourist Board, conversely, is obliged to market Northern Ireland as a stand-alone destination, and to work with the British Tourist Authority in presenting the North as a UK holiday destination. In that context, co-operation with BFÉ has, in the past, often been seen as a third (or even lower) priority.

While that perception may have been changing over the past decade, there is still a certain wariness in the North about tying in with BFÉ, possibly on the grounds that in an all-island scenario the North as a region might have no more call on marketing resources than any of the seven sub-regions of the Republic. This was memorably expressed by the NITB Chief

Executive, Ian Henderson, in a 1999 [speech](#) as analogous to a farm animal being left "sucking the hind tit".

Overseas representation

Apart from its Belfast head office and an office in Dublin, the Northern Ireland Tourist Board has offices in London, Glasgow, New York, Toronto, Frankfurt and Paris. Bord Fáilte has offices in Dublin, Belfast, Derry and numerous overseas markets. These include four cities where NITB is also present—London, New York, Frankfurt and Paris—along with Vienna, Brussels, Copenhagen, Helsinki, Milan, Amsterdam, Oslo, Madrid, Stockholm, Zürich, Johannesburg, Sydney, Auckland and Tokyo. There is an agreement in principle that NITB and Bord Fáilte will make each other's materials available through their respective offices, but it is not clear that this works well in practice. While the main holiday breaks brochures for the "other" destination may be available on request, and the Gulliver system allows online booking in either Board's territory, random calls to a few of the overseas offices suggested a lack of enthusiasm about supplying more detailed information.

In addition, NITB is represented in other markets by the [British Tourist Authority](#), which has offices in 27 cities, including the following which have neither NITB nor Bord Fáilte offices: Buenos Aires, Rio de Janeiro, Hong Kong, Rome, Singapore, Dubai, Chicago and Los Angeles. The BTA offices do not at present distribute any Bord Fáilte materials, but some BTA websites provide links to Bord Fáilte. The BTA has indicated that this policy may change if and when joint marketing arrangements are improved between NITB and Bord Fáilte, although it may be limited to BTA distribution of jointly produced cross border materials rather than Republic of Ireland information.

Comparing the statutory and regulatory regimes

Bord Fáilte and NITB use broadly similar grading categories and criteria for tourist accommodation, and have in the past operated similar systems of inspection and quality control. BFÉ pioneered the system in 1949 and it was adopted by the NITB in the late 1960s, remaining in operation in the North despite inconsistencies with the various (and less rigorous) systems used in other UK jurisdictions. There is now a significant divergence between North and South: a reform, following a review of Bord Fáilte carried out in 1994 by consultants A.D. Little Ltd, deprived Bord Fáilte of responsibility for maintaining quality standards. In the North all establishments offering tourist accommodation still have to be inspected and registered by NITB, whereas in the South registration is no longer compulsory except for hotels, guesthouses and self-catering premises. Other establishments do not need to register unless they want to appear in the listings of Bord Fáilte, the tourist office network and/or voluntary trade groupings that insist on registration. Access to support schemes, such as tax incentives, is available only to the approved sector.

Bord Fáilte now contracts out the registration function to (i) the British company [Tourism Quality Services Ltd](#) (TQS), which inspects and (after consulting with the Board of Bord Fáilte) grades and registers hotels and guesthouses, holiday cottages, holiday apartments and holiday hostels; (ii) a newly formed company, Tourism Accommodation Approvals Ltd, which inspects and (without consulting Bord Fáilte) approves (but does not grade) B&B accommodation and country homes, and (iii) Farm and Country Standards Ltd (FCS), which approves farmhouse B&Bs. Each of these industry bodies has its own guidelines for approval, based on standards agreed with Bord Fáilte.

While the comprehensive inspection system, as in the North, may be useful as a quality guarantee, the only pressure to restore such a system in the South seems to come from the

hotel industry, which regards the uninspected operators as unfair competition. Recent Southern governments have been content to allow market forces to dictate standards, on the basis that the resources consumed by direct regulation are better employed in marketing and development. The present minister, Dr McDaid, notes that more complaints are made in respect of the licensed sector than the unlicensed sector, and holds that customer dissatisfaction will weed out the poor operators in either sector: he is firmly opposed to Bord Fáilte reverting to the role of "a mattress inspector".

The absence of a common regime is probably a barrier to cross border working, particularly in relation to group marketing and voucher schemes, but it should not be insurmountable. (Of course in both jurisdictions all providers of accommodation are obliged, whether approved or not, to comply with official requirements in areas such as taxation, planning, fire and safety and hygiene.)

Marketing South-North and North-South

Bord Fáilte has its own tourist information offices in Belfast (where its Northern marketing operation is based) and Derry. The latter is an interesting case of evolving co-operation in that it was initially a Bord Fáilte venture with Derry City Council staff participating in the summer months, but it is now a permanent council facility with Bord Fáilte as a tenant.

NITB has a tourist information office and promotion service in Dublin, and this office tries to ensure that NITB literature including the main Irish-market *Holiday Breakaways* brochure is available through Southern TICs. The bulk orders for the brochure are handled through Bord Fáilte and Dublin Tourism, and despatched from Belfast, but the Dublin NITB office deals with requests from TICs for top-up orders and other information or literature.

Bord Fáilte headquarters in Dublin distributes the main publications (saleable accommodation guides and the popular *Discover Ireland* breaks brochure) not only to the district council-operated local TICs in Northern Ireland, but to commercial travel agents. All TICs and most travel agents stock the material, although our impression is that availability of the free material is less than for the priced publications.

A formal agreement was reached in the late 1990s between the two tourist boards whereby each undertook to assist the other with distribution of tourism literature. Whereas it was relatively easy for Bord Fáilte to ensure the availability of NITB materials through the Tourist Information Centres (TICs) run by the seven [regional tourism organisations](#), NITB has no direct control over the TICs operated by the 26 district councils. However, many of the larger TICs belong to the [Northern Ireland TIC Network](#); the "networked" centres (of which there are 26, in addition to about 12 local tourism offices and a larger number of unofficial tourist information points) receive guidance from NITB about what material to stock, in addition to practical support such as training, branding, and access to the all-Ireland Gulliver accommodation booking system. Networked centres are obliged to stock reference packs including Bord Fáilte material (and that of the British tourist boards). Consumer demand, which has always been higher for North-to-South holidays than vice versa, has also helped to ensure that Southern material is stocked by the local TICs. It is ultimately at the discretion of the local TIC management: we are advised that, apart from *Discover Ireland*, Bord Fáilte material is sent by the Dublin headquarters only in response to specific TIC requests.

Council-run TICs in the border areas of the North, and regional TICs on the Southern side, typically carry the main paid-for and free brochures of both tourist boards and literature on at least the neighbouring tourism regional or council district, and a random range of leaflets from private-sector attractions and accommodation providers in the other jurisdiction. Further away from the border TICs tend to have few of the local or private-sector leaflets, and the

official literature may or may not be in stock—the larger, priced, publications seem to be easier to find than the free brochures. Apart from the main brochures, which are distributed directly by the respective boards, arrangements for exchanging promotional material appear to be entirely informal and unco-ordinated; as one marketing officer told us “if I’m going to [my opposite number in the nearest Southern city] I throw a handful of leaflets into the car, and [she] does the same”. The result is a very uneven spread of coverage, depending wholly on the initiative of local staff. More than one Northern TIC worker told us that they see their job as promoting Northern Ireland (along with their employing council district) rather than the island as a whole. However most of the TICs we called were quick to advise on how to obtain the leaflets they couldn’t supply, and there was no overtly negative reaction in either jurisdiction to requests for information on the other.

Cross border tourism is obviously more difficult to monitor than arrivals from overseas, but the broad picture seems to be a substantial but relatively static flow from North to South, and a much smaller but increasing flow in the other direction. (A much-quoted estimate is that over 1m residents of the Republic have never visited the North.) While the currency differential is a major problem in the short term, the industry in general expects continuing growth in holiday traffic from South to North, dependent on lasting peace, and it is likely that an increasing number of annual conferences and cultural events hitherto held in Southern venues will come North. Recent examples were the World Irish Dance Championships in Belfast in April 2000, the first time the event was held outside the Republic, and in the same month the 40th annual convention of the Irish League of Credit Unions, held in the North for the first time in 17 years. This is, of course, very good news for Northern hoteliers but could come to represent a serious loss of market share for those in the South. The promotion of Belfast, in particular, as a convention venue is bound to cause some concern in the Republic.

Tourism Brand Ireland

One of the world’s largest tourism marketing ventures (sometimes cited as the largest ever), Tourism Brand Ireland (TBI) was launched in November 1996 with the support of Bord Fáilte and the Northern Ireland Tourist Board and a projected budget of £30 million. Although in the event this expenditure was subsumed into the expanded Overseas Tourism Marketing Initiative (see below) the overall impact of TBI remained at approximately the same level. TBI sought to ‘brand’ the whole island, in marketing terms, as a green and pleasant land. Bord Fáilte, in conjunction with an industry advisory committee, is currently engaged in a total review of Tourism Brand Ireland, including a reappraisal of prospects in the individual markets, and detailed market research among consumers. The project is likely to be substantially revised since it never attracted the anticipated level of private-sector support. Despite the use of Northern images in TBI visuals, the NITB has always felt somewhat left out of the actual benefits of the branding.

Any branding campaign typically involves the creation of a new logo, and in the area of tourism this was especially important since each Board had its own highly distinctive logo—Bord Fáilte’s featuring a stylised shamrock, and the NITB’s a hexagon alluding to the Giant’s Causeway. The TBI designers came up with a new design, incorporating the traditional colours of both Boards’ logos and depicting, somewhat loosely, a couple dancing or embracing around a shamrock. Both Boards invested heavily in placing the logo on their marketing materials.



There then followed a mini-crisis in North-South relations when the Fine Gael minister who had overseen the launch of TBI, Enda Kenny, was succeeded after a general election by Jim McDaid of Fianna Fáil. Dr McDaid apparently took a dislike to the agreed logo and instructed the Southern end of TBI to reinstate the traditional Bord Fáilte shamrock, albeit in an updated version (designed by the same consultancy). Adam Ingram, economy minister in the Northern Ireland Office, accused Dr McDaid of "unilateral action" and NITB persevered with the new logo, in which its investment was reckoned at about £500,000. The affair led to a certain amount of undignified sniping in the press by "sources close to" the respective ministerial offices, and the North's leading hotelier suggested that the row could jeopardise future co-operation. As mentioned [above](#), an exchange of correspondence and ministerial meetings addressed the issue.

The dispute was eventually smoothed over, with Dr McDaid reaffirming his commitment to co-operation, and the present position is that all three logos remain in use. Curiously though, whereas the current BFÉ branding uses both its own shamrock logo and the 'dancing' one to promote its own product, and uses the hexagon to represent the Northern Ireland product, NITB materials typically use the hexagon logo to market the North and use the 'dancers' to represent the Republic! (Examples of the usage will be found on [NITB](#) and [BFÉ](#) websites.) The upshot is that the "unified" logo, paid for by both sides and then publicly disparaged by the South's minister, has now come to be associated more with the Republic than with either the North or the concept of an island brand.

The TBI exercise was not, of course, just about logos. It has also involved the overhaul of the BFÉ website, which is often referred to as the TBI website, the production of a series of visual resources for use in television and print advertising, the development of a joint advertising campaign around the slogan "live a different life", the production of merchandise for trade promotions, and print advertising in key markets.

TBI has also been supported by an IFI-funded training programme for tourist information centre staff, backed by the two Boards, the regional tourism organisations and Shannon Development. Training has also been provided to scores of border-region small businesses.

Overseas Tourism Marketing Initiative (OTMI)

The Overseas Tourism Marketing Initiative (OTMI) is an EU co-funded annual consumer tourism marketing programme for the whole island, piloted in the North American market in 1994 and subsequently expanded to take in three other key markets—Britain, France and Germany. It resulted from an initiative by industry organisations rather than government or the tourist boards, but its expansion from 1996 onwards was mainly due to the state agencies weighing in as part of the Tourism Brand Ireland exercise. The OTMI is now in its final year, but is likely to be renewed in some form under the aegis of the planned cross border [company](#). The Initiative is managed by a limited company bringing together Bord Fáilte, the NITB and representatives of the industry in both jurisdictions. The annual budget, in the region of £7m, has been devoted to the production of marketing literature, the development of web-based information services, joint attendance at trade and consumer shows, and other exercises designed to familiarise the trade with the Irish tourist product and to promote it directly to the consumer.

OTMI Ltd was also involved in 1998-99 (with ITIC, CERT, BFÉ and NITB) in a IR£200,000 pilot programme on Tourism and Environmental Awareness. This was one of 22 programmes in a Tourism and the Environment Initiative funded by the Dublin government, the others having no significant cross border content.

The OTMI structure consists of a Board with representation from across the tourist industry, a Strategy sub-committee and Market Committees for each of the four key markets. These are chaired by board members and include a Project Management Team. The market-specific websites produced under OTMI are discussed [below](#).

The new cross border company

Intensive negotiations among Northern Ireland parties, and with the British and Irish governments, during the latter part of 1998 resulted in an announcement by the First and Deputy First Ministers on 18 December. This, among other things, set out 12 areas forming a "work programme" on North-South relations. (The accord was subsequently reported formally to the Northern Ireland Assembly on 19 January 1999.) It identified six areas involving new "implementation bodies" (the subject of a British-Irish intergovernmental [agreement](#) in March), and six other areas being "matters for co-operation".

The former category included four bodies with a potential impact on the development of tourism: principally [Waterways Ireland](#), but also a body dealing with [EU funding](#) mechanisms, an aquaculture body with responsibility for [marine tourism](#), and a [language](#) promotion body with scope for involvement in educational holidays. (Hyperlinks connect to references below to these bodies.)

In the latter category, in accordance with paragraphs 8 and 9 of Strand Two of the [Good Friday Agreement](#), the announcement envisaged co-operation through the mechanism of existing bodies in each separate jurisdiction.

Although tourism was identified as one of the latter six areas, it was agreed from the outset that, even without the creation of an additional implementation body, substantive progress on co-operation would require something more than the existing bodies had been able to deliver. In that context tourism found a 'halfway house' through the creation of a cross border company, rather than a fully-fledged implementation body. As with the other 11 areas for co-operation, it was envisaged that the scope of the company's work would be monitored and could be adjusted by agreement through the North-South Ministerial Council (NSMC). It is notable that in the December announcement tourism received a much lengthier treatment than the other five areas for co-operation, including the following description of the proposed company:

A publicly owned limited company will be established by Bord Fáilte and the Northern Ireland Tourist Board to provide the following services:

- planning and delivering international tourism marketing programme, including programmes in partnership with the industry North and South;
- publication and dissemination in overseas markets of information of a balanced and comprehensive nature on the island of Ireland as a tourist destination, which must reflect the diverse traditions, forms of cultural expression, and identities within the island;
- market research, provision of information and other appropriate assistance to help this industry develop international marketing expertise;
- co-operation with, consulting, and assisting other bodies or associations in carrying out such activities;
- carrying out surveys and collecting relevant statistics and information.

The new company would subsume the existing Overseas Tourism Marketing Initiative. It would carry out overseas marketing and promotion activity for Bord Fáilte and the Northern Ireland Tourist Board, and would establish overseas offices for the purpose.

The company's Articles of Association and Memorandum, which would establish its overall strategic objectives, would be agreed by the two administrations. The board of the new company would be appointed by the two administrations after consultation with the existing tourist boards and relevant industry interests and with their involvement.

The operations of the new company would be monitored by the existing tourist boards, and by the relevant Northern Ireland and Irish Government Ministers meeting as appropriate under the auspices of the NSMC.

The Northern Ireland Tourist Board would continue to have access to the services of the British Tourist Authority. There would be clear guidance to the company that its promotional efforts should take account of the need to develop tourism in Northern Ireland against the background of the particular problems faced by the industry there over the past 30 years.

Unlike the six "implementation bodies", whose existence and functions were legislated for in the [UK](#) and Irish parliaments, the six "matters for co-operation" including tourism were essentially dependent on the existence of a regional administration in the North, able to participate in a North-South Ministerial Council. At the time of writing the devolved institutions, and thus the NSMC, were in suspension and the tourism company had not yet been legally incorporated. It had, however, been agreed that the company would be headquartered in Dublin with a regional office in Coleraine.

It is instructive to note that the role of the private sector in the new company (as opposed to that of the tourist boards) is barely alluded to in the official announcement, and this very likely reflects the fact its genesis as a political rather than an industry initiative. However it has been made clear to us that the private sector wants, and indeed will insist on, a major role in the company; it is determined that joint marketing should be driven by the needs of the industry as a whole and the specialist sectors within it, and it does not want the commercial focus to get lost in the political drive for co-operation.

In [evidence](#) to a parliamentary committee in 1999, the chairman of the NITB gave it as his understanding that the new company would take over all international marketing activities, leaving NITB to concentrate on the "domestic market" which he defined as England, Scotland and Wales; his chief executive clarified that marketing the North in the South would also be an NITB function. By implication, BFÉ would be reduced to marketing the South in the North, and possibly also in Great Britain if that market, traditionally and logically regarded as an overseas one, were to be treated as domestic. In fact a close reading of the December agreement does not preclude either Board from continuing 'own brand' marketing exercises, alongside or instead of joint company ones, in any foreign market. A further point from the parliamentary evidence was confirmation that NITB had up to that point no involvement in planning for the new company, which it plainly regarded as a political issue.

Tourism Marketing Partnership

Clearly signalling that the Southern government and industry were not prepared to sit back and wait for the new company to get under way, the Minister for Tourism, Dr McDaid, announced in April 2000 the creation of a new strategic planning body. The Tourism Marketing Partnership, with very senior representation from BFÉ and Southern commercial interests, was charged with a number of responsibilities that overlap with the proposed work of the North-South body. While we are not aware of any (public) reaction so far from Northern tourism interests, this initiative is bound to cause concern in the North; at best it will give the South even more of a lead in co-ordinating the domestic interests and addressing overseas markets, and at worst it could pre-empt the work programme of the new company by committing Southern resources for at least the next few years.

The tasks of the Partnership include involving Bord Fáilte and the industry in ensuring the most effective usage of marketing funds; co-ordinating annual marketing programmes between the Board and the industry; and, of special significance in the North-South context, preparing **multi-annual** marketing strategies based on the [National Development Plan](#) targets for tourism. The Partnership will include about two dozen leading figures, in two operational groups. One, dominated by BFÉ but including transport operators, will deal with the international marketing of the Republic as a holiday destination. The other, in which BFÉ will have a secondary role, will bring together the major players in product and niche marketing—hoteliers, incoming tour operators, marketing collectives and so on.

It is too early to say whether the existence of the Partnership will seriously hinder the all-island marketing effort. It might be argued that it will provide a model of public-private sector co-operation that could be adapted just by adding Northern representation. However the fact that it was conceived as a vehicle for implementing the South's NDP, and that Northern interests were excluded ab initio, suggests that the Partnership has at least the potential to work directly against the North. Given that the Northern Ireland Tourist Board had made it known some time ago that it was to undertake a full review of its own Tourism Development Programme in the year 2000, there was an excellent opportunity to develop a co-ordinated approach, but barring urgent political intervention it now seems likely that for the immediate future North and South will be putting more effort into separate strategies than into all-island work.

Web services

Lest it seems extravagant to devote much of this document to a detailed look at internet sites, it should be noted that this medium has probably become the most important means of selling the Irish tourism product. The main BFÉ site already receives in excess of 1.7 million hits per year, more than the combined total of enquiries received by the Board from all other sources. In this context it is instructive to see how far the internet sites of each jurisdiction promote travel, accommodation, facilities and attractions in the other, as a minimum through the provision of external links. References to websites refer to the situation in May 2000: most of the sites are regularly updated and some of the issues we raise may have been addressed in the interim.

Bord Fáilte sites

BFÉ GLOBAL WEBSITE

The [main Bord Fáilte site](#) has a front-page link to the [main NITB site](#), albeit discreetly positioned at the bottom of the page with no logo. However the site does not list any accommodation, attractions or facilities in Northern Ireland. The map in its [accommodation search](#) section shows Northern Ireland as a featureless, unnamed region devoid of ports and airports. Hyperlinks to region-by-region listings switch on only as the cursor travels back over the border. The associated search engine accepts Northern destinations but denies the

existence of any facilities: for example, if one asks for hotels in "Belfast" one is first asked to specify which of nine terms to use (Belfast City Centre, Belfast West, Belfast East, Belfast Greater and so on) and, no matter which is selected, the system replies "nothing found: please widen your search". Nothing is, in fact, found until the search is wide enough to cross the border. Another interesting feature of the BFÉ site is that its [maps and route planner](#) refer to "Londonderry" and do not recognise the form "Derry" which the Board has traditionally used. (The maps are provided through a www.map-ireland.com address which, although it is within the Tourism Brand Ireland site, is clearly designed mainly for travellers to the South; for example the option to plan an itinerary through "county capitals" offers only 26 counties.)

BFÉ BRITISH MARKET SITE

BFÉ maintains a www.irelandtravel.co.uk [website](#) aimed at people intending to visit Ireland from Britain. Confusingly, the Board also has a www.irelandholidays.co.uk [website](#), carrying information that was until very recently in the "British OTMI" pages of the main BFÉ site. In both cases, if the sites are indicative of the organisation's enthusiasm for joint marketing with the North, they did not (at the time of our visits in May 2000) inspire a great deal of confidence.

The pages host a [selection of offers](#) aimed at the British market, from ten commercial tour operators (all Southern-based) and seven carriers (including some serving Northern entry points). While the front page invites users to "click the above buttons of the Irish Tourist Board and the Northern Ireland Tourist Board" the only logo on view is the "dancing around the shamrock" one which in fact links to neither Board. There is only one external link on the page which goes, oddly enough, to the main Bord Fáilte site. The [City Breaks](#) page starts out promisingly: "Dublin, Belfast, Derry, Galway, Cork and Limerick are exciting, bustling, vibrant university cities..." but the only offers available are for Dublin, Cork and Galway. The [Escorted Coach Tours](#) page features only Southern operators, touring only in the South. Northern destinations or arrival ports are not mentioned in the pages on self-drive holidays and short breaks, but the [activity holidays](#) page mentions two Northern golf courses in the introductory text (the region has 80 others), and features two Shannon-Erne cruise offers (and nine wholly Southern offers).

The 'irelandtravel' site carries what looked like a link to NITB on many pages, along with the "dancing around shamrock" logo, but sometimes the NITB 'link' is just a [graphic](#) with no hyperlink. The 'irelandholidays' site has one [page](#) on the new UK site giving working links to both the Boards.

The travel site has [maps](#) showing Northern ports, but the assumption was obviously that visitors will want to avoid the North: there is, for example, a reference to the conventional ferry crossing as 3.5 hours (implying Dublin or Dún Laoghaire to Holyhead), rather than Cairnryan-Larne's one hour. Information was and is, however, given on how to contact ferry operators between Britain and the North.

Another map names Northern airports (albeit showing only one for Belfast, which has two), but no Northern airport can be selected as the destination from any British airport; from London Heathrow, the site implies that it is possible to travel only to Dublin or Cork. Belfast or Derry are convenient arrival points for holidays in some parts of the Republic, but the BFÉ site, for example, encourages anyone wanting to get from Glasgow to County Donegal (with which that city has strong historical links) to make a huge detour via Dublin rather than passing through the North. This is somewhat surprising given the large amounts of Southern public money pumped into the development of City of Derry Airport, a few miles from Donegal, which has daily flights from Glasgow. Information on internal travel refers only to services, costs and signposting within the Republic: cross border travel, and travel within the

North, are not mentioned. The [places to visit](#) page has a clickable map that functions (by hyperlinking to regional tourist offices) only when the cursor is safely south of the border.

BFÉ SITES FOR OTHER MARKETS

There are a number of separate Bord Fáilte websites for major overseas markets, and in those sites and within the main site there are market-specific "how to get here" travel information pages. Coverage of the North is somewhat uneven, in both categories. None offer tourist information, accommodation or visitor attractions for the North, some offer links to NITB and a few offer routes via the North. Where the sites or pages refer to internal air or other travel, Northern Ireland is invariably omitted.

- AUSTRALIA & NEW ZEALAND: Northern Ireland routing information (ferry only) is shown in the [getting here](#) page; this page does not have a link to NITB.
- BELGIUM: Northern Ireland routing information is not shown in the [getting here](#) page, which does not have a link to NITB. (Brussels has a direct air service to Belfast.)
- DENMARK: A working link to the NITB main website is provided on most pages of the BFÉ [Danish site](#). Northern Ireland routing information was shown in the "how to get here" page on the main BFÉ site when we checked it in April, but by late May the information had been transferred to the Danish-language site, the NITB link logo did not work, and references to the North had disappeared. Belfast has a one-stop flight from Copenhagen, but the site now shows only direct services to Shannon and routes via London to Knock, Dublin and Cork.
- CANADA & USA: The [North American Market site](#) has a link to NITB and has information on travel to or through Northern Ireland. However the clickable map connects only to Southern information.
- FINLAND: There is an NITB link but no Northern Ireland routing information in the BFÉ [Finnish site](#).
- FRANCE: There is an NITB link at the French site [front page](#) but no NI routing information in the "how to get here" page.
- GERMANY: The BFÉ [German site](#) has an NITB link, but its [travel information page](#) has nothing on flying to Northern airports (but ferry links are mentioned).
- ITALY: The BFÉ main site's [getting here](#) page has no NITB link and nothing on air or ferry links to the North.
- NETHERLANDS: The BFÉ [Dutch site](#) has a working NITB link on every page, but its [travel information page](#) has nothing on air or ferry links to the North. Again, the clickable map connects only to Southern information.
- NORWAY: The BFÉ [Norwegian site](#) also has a working NITB link on every page, but its [travel information page](#) has nothing on air or ferry links to the North. The clickable map connects only to Southern information.
- SOUTH AFRICA: The BFÉ [getting here](#) page does not mention air or ferry links to the North.
- SPAIN: The BFÉ main site's [getting here](#) page has no NITB link but mentions ferry links to the North. There is a single mention of flights from Britain to Belfast, but in a context that suggests none of them originate in any London airport (details are given of 13 routes from London to the Republic).

· SWEDEN: The BFÉ [Swedish site](#) has a working NITB link on every page, and its [travel information page](#) offers ferry links to the North (but air routes only to the South). The clickable map is intended to connect only to Southern information, but careless image mapping means that it functions in south Fermanagh (connecting to the North-West RTO).

All of these sites are linked to from the travel section of the large government-sponsored [Ask Ireland](#) site, which provides no additional information of its own on routing. Several commercial sites also provide links, so that the insufficiency of data on the BFÉ sites has a knock-on effect. In all cases where NI travel information is omitted it is not just because Northern ports or airports have no direct links with the relevant markets: the sites often give details of flights via Britain, but only if they terminate in the South.

It is only fair to say that the BFÉ sites were obviously undergoing a considerable amount of work around the dates when we checked them. The information may change while this document is being completed, but it provides a snapshot of the situation in May 2000. It is possible that this ongoing web development accounts for some of the missing data on the North and broken NITB hyperlinks. However one might form the impression that the lacunae are attributable to a desire to bring in tourists only through Southern ports, and to encourage them to stay within the Republic throughout their visit. While it might be argued this is only reasonable for a body wholly funded by the Republic, it is hardly consistent with the concept of all-island marketing. In particular, the near-impossibility of learning of the existence of Derry airport from Bord Fáilte's vast internet operation sits uneasily with ministerial pronouncements on, and funding commitments to, what strives to become the 'gateway to the North West'—a disadvantaged region for which tourism represents a crucially important source of revenue. (The author should perhaps declare an interest as a Derryman.)

REGIONAL SITES

Bord Fáilte works with regional tourism authorities in seven regions, each of which have their own websites compiled with, and in the same format as, the main Bord Fáilte pages. While most of the Global and British Market web pages have a link in the margin to the NITB site, it is interesting to note that the regional pages do not, even for the two regions on the border: the [North West](#) and [Midlands East](#). The regional sites make no mention of attractions or facilities on the other side of the border; indeed the North West site fails to mention City of Derry Airport, part-funded by the Irish government because of its supposed strategic value to North West tourism, industry and commerce. The same site has a map of the Republic's four border counties in the region, represented more or less as an island with the Atlantic to the left and white space representing where Northern Ireland might be.

NITB sites

MAIN NITB WEBSITE

The Northern Board's internet presence is, as one might expect, very much smaller in scale. As an indication, searching for the phrase 'Northern Ireland Tourist Board' on a major search engine, [Google](#), produces 1,652 matches, as against 5,296 for 'Irish Tourist Board' or either of the variants, 'Bord Failte' or the correct accented form, 'Bord Fáilte' (counting only once sites where more than one of the three forms is used).

It is important to note that the NITB website is currently undergoing a redesign which may address some of the issues mentioned below.

The current [NITB website](#) does not list any accommodation or other facilities in the Republic. Its home page has a small but working link to Bord Fáilte, and a slightly more prominent Union Flag logo hyperlinking to the [British Tourist Authority](#). None of the other pages appear to have any Bord Fáilte links or information on anything in the Republic. The travel

information section is generally good in relation to sea travel (in that it provides information on direct sea routes to the Republic, and the numerous permutations of "land bridge" crossings via the Republic). The air travel section provides "getting here" information for many fewer markets than the Bord Fáilte sites, and treatment of the Republic as a possible point of entry is uneven. The site concentrates on flights from or via Great Britain, but in some subsidiary pages the possibility of arrival via the Republic is conceded.

For [Austria](#), a flight to Dublin is mentioned as one of two options, the other being a British Airways connection to Belfast via London (many other possible connections via other airlines and/or cities are not mentioned). For [Belgium](#), the NITB site mentions one air route to Belfast, and possible connections via England, but it omits to mention the three airlines providing direct flights to the Republic. For [France](#), the site correctly says that there are no flights to the North and proposes connections via England, Scotland or Belgium, before mentioning a direct Aer Lingus flight to Dublin. There is no space to mention the other eight or so other scheduled air routes from France to the Republic. For [Germany](#), the site mentions only indirect flights via Brussels and/or Britain, although there are at least eight direct flights from German airports to the Republic. For [Italy](#), the site omits to mention that there are no direct flights to the North but it does give contact details (but no routing information) for the two airlines that provide direct flights to the Republic from three Italian airports, along with contact details for British Airways which (along with many other unlisted airlines) can provide stopover connections to Ireland. For [North America](#), however, the NITB site lists numerous possible routes via the Republic alongside the various potential stopovers in Britain. The only other point of origin with its own routing page is [Switzerland](#), for which details are given of one of the two airlines flying to the Republic, along with sparse details of only a few of the numerous possible indirect routes to Belfast.

Numerous other countries (about a dozen) with scheduled air services to the Republic, leaving the potential tourist only a few hours from the North, are not even given their own travel information page in the NITB site, let alone an own-language site or page as BFE tends to provide. The regrettable impression is that the NITB marketing experts regard it as only a slim possibility that someone wanting to holiday in Northern Ireland from overseas would choose to fly to Ireland, rather than stopping off in Britain. Logic suggests that the most effective way to increase tourism in Northern Ireland is to entice across the border some of the millions who already come to the Republic, but the NITB site seems to be pitched at people who insist on direct flights to Belfast (of which there are few) or connections in London (preferably with BA plc).

Aimed at the North American market, a somewhat outdated and whimsical "Official [Home Page](#) of the Northern Ireland Tourist Board" on the Interknowledge commercial travel information site has practically no information on the Republic (other than a warning about the fact that the currency is different). The site has no link to Bord Fáilte, although most of the North American tour operators listed happen to offer holidays in the Republic (in some cases, they do not offer Northern packages at all, but perhaps the intention was to generate pressure on them to do so).

REGIONAL SITES

The North's regional tourism organisations have as yet only a small internet presence. The [Kingdoms of Down](#) region has a site providing information on travel from, but not to, the Republic, and information on NITB and other Northern tourist information offices, but not on Bord Fáilte or other Southern resources.

Commercial sites

In the time available for this study, and considering the limited value of the exercise in terms of mapping North-South co-operation, we have not been able to survey many of the Irish

tourism websites provided by tour operators or commercial information providers. The overwhelming impression from visiting a random selection of 50 or so is that there is vastly more information available on the Republic, and that the majority of sites with holiday information on the Republic have little on Northern Ireland (although most, other than locality-specific sites, have at least a mention or a relevant link). There are exceptions, such as the US-based www.shamrock.org site and the [Travel Ireland](#) links-based site, both of which have proportionate coverage of the North. The best commercial site in terms of all-island coverage appears to be [GoIreland](#), which modestly describes itself as "Ireland's National Tourism Service" (maintained by the Dublin firm Priority Communications Limited, trading as Touchtel). This provides extensive information on 11,000 accommodation providers, attractions, travel and tours (with suggested itineraries encouraging cross border visits), and it includes a booking facility and discussion forums.

More typical is the Scottish-based [Destination Ireland](#) site, which absurdly claims to be "the foremost directory for promoting Irish accommodation on the internet". It offers an accommodation database for the island, arranged by province: the Ulster directory lists only one hotel in Cavan, and there are no Northern links. Even the Dublin-based [Information about Ireland Site](#) has no Northern content, and a map omitting the border but showing only two Northern cities (and about 60 towns, cities and villages in the South, listing 100 tourist attractions). An 'Irish Tourist Report' downloadable from the site does not mention the North's existence. The Dublin-based [Hotel Ireland](#) site, which provides a booking service also contactable by US and UK freephone numbers, likewise has no Northern information or links.

As an illustration of the relative proportions of coverage, one can try entering similar strings of words associated with tourism and, respectively, the Republic and the North in any major search engine. Using Google, we find 1,050 pages listed if we search for the exact phrase 'holidays in Ireland', but only 30 pages returned for the phrase 'holidays in Northern Ireland'. Of the 1,050 commercial and personal pages listed as containing the phrase 'holidays in Ireland', only 332 even have a mention of the phrase 'Northern Ireland', and that includes what might be termed negative contexts (references to, or links to information on, the conflict).

British tourism sites (i.e. sites aimed at potential visitors to the UK, whether or not published from Britain) tend to have very little information on Northern Ireland or the Republic, although many provide links to the two Boards. An example is the Welsh-based operation, GB Online, which offers a [Tour Britain](#) site. While it purports to provide information on "The British Isles—England, Scotland, Wales and Ireland", its coverage of the westerly British Isle is of limited value. Much of the content is clearly based on Bord Fáilte material and refers only to the South, but the Ireland information is actually accessed by clicking on a Northern Ireland flag. Maps on the site represent Northern Ireland either within its present border but as a single grey region, contrasting with bright colours used for the counties of the Republic, or as a vague swathe of the top end of the island, taking in Donegal but omitting most of Fermanagh, Armagh and Down. Similar cartographic aberrations can, of course, be found on many other websites and occasionally in printed literature (including a Stena ferry brochure which made headlines in May 2000 for donating the Inishowen peninsula to Northern Ireland, to the delight of John Hume).

Gulliver

The web-based [Gulliver](#) tourism information and reservations system established following a 1990 agreement between the two Tourist Boards (initially as an in-house operation but subsequently sold off), is one of the highest-profile Tourism Brand Ireland ventures. It enables users anywhere in the world to access information on registered accommodation providers in Ireland, and to make bookings. Gulliver InfoRes Services Ltd, the company

operating the system since mid-1997, manages the website and processes bookings received from the Gulliver International Call Centre, the 65 tourist information offices in Ireland, and the internet. It is intended to make the database available to travel agents and international travel websites.

The Gulliver service is only available to product providers by an annual subscription. Its database currently includes almost 12,000 accommodation outlets and information on some 20,000 visitor attractions and tourist information topics. In 1998 over 100,000 bookings were made through tourist offices, and the company expected to handle over 400,000 enquiries for the year 2000. The service includes GullNet, an extranet service enabling Gulliver members (except, for the present, self-catering premises) to update their details, retrieve booking and cancellation data, and access industry notice boards. As a separate business, the Gulliver call centre handles tourist information requests for Bord Fáilte, currently dealing with calls originating in Ireland and Britain but with plans to take over from US and European Bord Fáilte offices in the near future.

The development of the service has not been without problems, including a lengthy legal dispute between Bord Fáilte and Tour Contractors Ireland (TCI) over the role of the private sector in developing the project and the relationship between the state-funded agencies and FEXCO, an international financial services company that acquired a 74 per cent stake in Gulliver in 1997. (The other 26 per cent remains with the two Tourist Boards.) However the service appears to operate efficiently, both Boards proclaim their satisfaction with it, and coverage of North and South is equitable considering the relative size of the tourism sector in the two jurisdictions. The South has gone a very large step further in that it is possible to access Gulliver booking directly through the Bord Fáilte main [website](#), with links provided from the overseas market sites, whereas NITB can only process applications by callers to its own offices or local TICs.

EDUCATION

- *tourism and hospitality training*
- *research centres*
- *research and education funding and co-ordination*

Tourism and hospitality training

CERT & NTCB

[CERT](#), founded in 1963, is the state tourism training agency in the Republic for the entire tourism sector. CERT is governed by a Council which reports directly to the Minister for Tourism, Sport and Recreation. It operates through seven regional offices, Department of Education colleges, CERT Hotel Schools and CERT Training Centres. The agency trains over 11,000 people per year (177,200 since 1963), both new entrants and current tourism employees, on full-time and part-time tourism and catering courses. It produces training publications and resources, researches employment and training needs, consults extensively with the industry and develops national curriculums and certification for tourism, through the [National Tourism Certification Board](#) (NTCB, managed jointly by CERT and the Department of Education). CERT also engages in special initiatives to assist recruitment and retention and to improve quality, such as Best Service Plus, a companywide programme for the industry.

CERT has limited contact with organisations in Northern Ireland but it is interested in establishing new links. In particular, it expects to develop co-operation with the new Tourism Training Trust (see below). CERT runs a national Wine and Dine Awards scheme for catering students, but it has not recently had any entrants from the North.

Hospitality Training Foundation (HtF)

The [Hospitality Training Foundation](#), formerly the Hotel and Catering Industry Training Board, has since 1997 been the recognised national training organisation (NTO) for the hospitality industry in the UK (where over 70 per cent of hospitality industry employment is in tourism-related businesses). As such it does not directly provide training but has a strategic role in identifying the current and future skills needs of the industry, and ensuring that education and training arrangements are in place and are accessible to employers; it engages in “skills forecasting”, develops training standards, advises government on training needs, and generally promotes employment and training in the industry. The HtF has to date had a limited impact in Northern Ireland, where it is recognised that the industry as whole is underqualified by comparison with Britain. Its two projects to date in the North have been an exercise in evaluating training standards, in consultation with local colleges, and work with the NI Prison Service in developing training for prisoners in food preparation and cooking. Following devolution, the HtF has been working to develop devolved structures for Scotland and Wales, and it very recently began to work on a strategy for Northern Ireland, where its new regional chapter is closely connected with the TTT (see below).

Tourism Training Trust (TTT)

The Tourism Training Trust was established in 1997 with support from the Training and Employment Agency (T&EA) and the Northern Ireland Tourist Board (NITB). The TTT has been involved in a small-scale project with a US hotel chain providing training in America for a dozen Northern Ireland hotel workers, but it needs to expand considerably if it is to impact on the skills shortage in the industry.

In November 1999 a Tourism Training Strategy was launched recommending an industry-wide co-ordinated approach, mechanisms for the identification of manpower needs, the quality of training and measures to improve the image of the industry as an employer. It suggested that in the medium term up to 20,000 new jobs could be created in tourism.

The report, commissioned by the TTT and the T&EA from a commercial consultancy, made very little reference to cross border co-operation. The recommendations referred almost exclusively to Northern commercial interests, government departments and agencies, and included proposals for restructuring the TTT Board—in a way that left no room for Southern participation. The report also proposed the creation of a wider TTT Council to include various Northern agencies, with a lengthy justification for including the Northern Department of Agriculture, but again with no mention of Southern interests. Elsewhere the potential for co-operation with Southern bodies was mentioned in the context of “a requirement for improved linkages with other national training organisations in Scotland, England and Wales and the Republic of Ireland” (stated in that order, and unnamed). The report discussed the desirability of developing ‘centres of excellence’, and of the dearth of suitable training centres, only in a Northern context, and references in the report to South Africa are longer than those to the Irish Republic.

Dublin Institute of Technology (DIT)

The Dublin Institute of Technology [Faculty of Tourism and Food](#) describes itself as “Ireland’s leading centre for undergraduate and postgraduate education in the areas of Hospitality Management, Tourism Marketing, Leisure Management, Culinary Arts, Environmental Health

Management, Food Science and Technology and Health Care Management". The successor to a College of Domestic Science opened on the same site in 1941, the Faculty at present consists of a [School of Hospitality Management & Tourism](#), a [School of Hotel & Catering Operations](#) and a [School of Food Science & Environmental Health](#). Five full-time undergraduate degree programmes are offered, and ten Diploma/Certificate courses. Some 35 Diploma/Certificate courses are available on a part-time basis. Three MSc courses (in Tourism Management, Hospitality Management and Environmental Health Risk Management) are offered on a full- or part-time basis. Research is carried out within the Schools and in three Research Centres, including a Tourism Research Centre (see below). The Faculty appears to have no substantive links with any Northern institution, nor does it have any Northern students at present.

Northern centres

Tourism training is provided at a number of FHE establishments in the North, including the Belfast Institute of Further and Higher Education, and at further education colleges. The Northern Ireland Hotel and Catering College, Portrush (affiliated with the [University of Ulster](#), UU) offers HND courses in Hotel, Catering and Institutional Management, HND in Food, Consumer and Marketing Management, HND in Travel and Tourism Management, HND in International Hospitality Management, a BA (Hons) in Hotel and Tourism Management and a BA (Hons) in Hospitality Management. The HND Tourism and Hospitality Management is also provided at North Down and Ards Institute of Further and Higher Education, Bangor, in association with UU.

The University of Ulster at Magee offers BA, BA Hons, PGDip, DipHE and MA courses in Hotel and Tourism Management, Tourism Management and Hospitality Management, and (as noted elsewhere) has plans to develop a Master of Business Administration in Tourism Management jointly with the University of Limerick. Some of these courses are available for part-time study.

At Queen's University Belfast, the former Institute of Continuing Education, now the Institute for Lifelong Learning, offers part-time certificate courses and BA modules in Tourism and Cultural Management, and a new two-year Postgraduate Diploma in Cultural Tourism.

Research centres

Limerick

The [National Centre for Tourism Policy Studies](#) (NCTPS), created at the [University of Limerick](#) in 1993, engages in research and consultancy on the tourism sector. One of the Centre's many research areas covers the prospects of tourism development in the island of Ireland, but there is not much current research activity in this field. The NCTPS runs a full-time two year research Masters in Business (Tourism) in conjunction with the College of Business at the University; it has not so far had any Northern students, which it attributes to the student funding regime, but one recent Masters dissertation dealt with North-South co-operation in tourism. Limerick has at present about two dozen tourism students at Masters level, with two current doctoral students.

The NCTPS was involved in discussions, which reached an advanced stage, with the [University of Ulster](#) at Magee (Derry) on the creation of a joint MBA programme in tourism. The proposal was approved in principle by the UU Academic Council but the initiative appears to have slowed to a halt with the recent departure of the UU professor to an English university. Limerick is interested in reviving that project, which had already led to a number

of research seminars and other exchanges, but it is felt that progress will depend on developments in North-South institutions. Two NCTPS academics published a 1997 volume on tourism policy and performance in Ireland, mainly dealing with the Republic but with one chapter on North-South co-operation.

The Limerick academics are very much in favour of an expansion of cross border co-operation on tourism research, but feel that the present funding regime is not responsive to the needs of the industry. Along with others in several parts of the industry, they expressed the view that the approach in the past has been overly reliant on calling in commercial consultants for one-off reports, rather than developing a permanent research and development infrastructure to meet the strategic requirements of this vast industry.

Dublin

The [Tourism Research Centre](#), established in 1996 within Dublin Institute of Technology (see also above), provides the tourism industry with research and development, training and consultancy services. Areas in which it claims expertise include tourism development, hospitality management, rural tourism, environmental management, facility design, heritage management, quality assurance, marketing, technology and leisure management. The Centre has not to date engaged in any cross border work.

Other centres

A small amount of tourism marketing research has been conducted at [University College Cork](#). Some work on the sociology and geography of tourism is undertaken at the National University of Ireland at [Maynooth](#).

Research and education funding and co-ordination

The Republic's EU-funded Operational Programme for Tourism devoted 110 MECU (17 per cent of the OP's total resources) to Sub-Programme 4, Tourism Training, over the period 1994-99. Given the state-specific nature of most EU funding, none of this training was offered on a cross border basis. The OP also contained provision for natural/cultural tourism, product development and marketing, but as far as we have been able to establish none of this went into academic research and none was spent across the border.

We have referred elsewhere to a fairly small IFI-supported training programme for TIC staff from both sides of the border. Although we are reluctant to make a definitive assertion on the basis of a brief period of research, it seems that this may be the only instance to date of practical cross border co-operation in training for an industry that faces a serious skills shortage at a time of potentially huge increase in demand. Given that the two jurisdictions share a small island, are (more or less) jointly marketed as a tourism destination, and form part of a single EU labour market, there would seem to be an irresistible case for a collaborative approach to meeting the training needs of the two jurisdictions.

Likewise with research, when the Republic, which has been so much more successful in terms of increasing visitor numbers and revenue, has failed to put in place an appropriate national strategy for R&D, it is unrealistic to expect the North's much smaller revenue base to produce one autonomously. Taking the island as a whole, however, given that the problems and challenges are broadly similar, the terms of reference for the new cross border tourism company are drawn broadly enough to allow it to become, or to support, an island-wide research fund or think tank.

INDUSTRY ORGANISATIONS

- *industry groups in Ireland*
- *work at European level*
- *language-based tourism*

Industry groups in Ireland

Tourist industry confederations

The [Irish Tourist Industry Confederation](#) (ITIC), formed in 1984, represents commercial tourism interests in the Republic. In 1998 it published a study, *Strategy for Growth Beyond 2000*, addressing the needs of and prospects for the industry. The study, jointly funded by the EU Operational Programme for Tourism, was influential in bringing about significant changes in tourism policy, including the introduction of a multi-year marketing fund and an increasing level of private-sector participation in tourism planning.

During 1999 the ITIC launched a 'People and Place' programme intended to define and protect the special characteristics of the Irish holiday experience. The initiative is being funded under the Southern government's Tourism and Environment Initiative, and by OTMI, Bord Fáilte, CERT and the Northern Ireland Tourist Board.

In Northern Ireland, a parallel body exists only in embryonic form, as an informal umbrella group for tourism interests. The [Northern Ireland Tourist Industry Confederation](#) (NITIC) was established in 1998, as an initiative arising out of the Northern Ireland Growth Challenge (which currently provides its secretariat). NITIC usually meets every two months and participants include some of the main travel and hotel interests, with NITB attending with observer status. It is intended to evolve into the main representative organisation for the private sector, eventually with a formal membership structure. To date NITIC has had only occasional, ad hoc contacts with the ITIC, but it is just about to discuss the future working relationship between the two bodies. NITIC has also been active in developing East-West links, primarily with Scottish and Welsh industry organisations.

Hotel federations

The [Irish Hotels Federation](#) (IHF), founded over 60 years ago, is the recognised representative organisation of the hotel and guesthouse industry in the Republic, with over 850 premises as members. Its activities include lobbying for a satisfactory taxation and investment climate for the industry. The Federation, based in Dublin, has 11 regional branches, and is managed by an elected National Council. It is a member of HOTREC (see below) and the International Hotel & Restaurant Association (IH&RA). The IHF works closely with Bord Fáilte on domestic and overseas marketing of hotels and guesthouses, promotes co-operative and individual marketing, provides a range of advisory services and benefits to members, and participates in seminars and workshops addressing specific marketing issues. The Federation has representation of the Board of Overseas Tourism Marketing Initiative (OTMI) and promotes the Domestic Tourism Marketing Initiative (DTMI).

The IHF's "Be Our Guest" marketing initiative includes production of a full-colour brochure distributed through NITB, Bord Fáilte and other outlets, and a [website](#) featuring member hotels and guesthouses. This features not only IHF members, but members of the Hospitality Association Northern Ireland (see below).

The IHF is in frequent contact with, and meets formally once a year at executive level, with its Northern counterpart, the [Northern Ireland Hotels Federation](#). The NIHF is keen to maintain and extend these links, and to engage fully in co-operative and island-wide development initiatives.

Formed as the Northern Ireland Hotels and Caterers Association in 1922, the NIHF represents hotels and guesthouses in Northern Ireland. It is consulted on industry issues by government departments and provides a range of services to members and the wider industry, including the annual Hospitality Exchange conference and exhibition, and seminars and workshops. NIHF has recently commissioned a major review of tourism from PriceWaterhouse Coopers and its findings will be presented at this year's conference in October in Belfast. A member of BHA, NIHF has close links with many other trade organisations North and South, and is represented on HTF, OTMI, TTT and other bodies.

Bed and breakfast sector

[Town and Country Homes](#) (formally, the Town & Country Homes Association Ltd) is a marketing group formed in the 1970s and currently representing 1,900 BFÉ-registered bed and breakfast providers in the South. Its website, which includes a reservations system, features premises in all 26 Southern counties, but there is at present no information on or link to Northern providers or organisations. ### While many of its premises can be booked through [Gulliver](#), the online system established by both Tourist Boards, the Town and Country Homes website provides addresses only for BFÉ tourist information centres abroad, not for the NITB ones which can also access Gulliver.

That might at first appear to be a discouraging analysis, but in fact Town and Country Homes is among the most enthusiastic trade bodies in relation to North-South links. Its paid-for brochure includes advertising from the NITB, which has supported efforts to build links between Town and Country Homes and the main Northern groups (the NIFCHA—see below—and the grouping formerly known as Town and Seaside Homes, now B&B NI). Town and Country Homes has offered to provide associate membership to Northern establishments, and expects to include some in its brochure from 2001 onwards. It has also offered to extend its central reservations service, and its voucher scheme has been recognised by the two Northern groups since 1993 (although takeup has been complicated by the currency differential). Members of the two Northern groupings will also be listed (as they were some years ago) in the trade brochure supplied by Town and Country Homes to tour operators and travel agents, and those who accept vouchers will also be listed in its new [trade website](#) (although only full members, if and when there are any in the North, will be featured on the consumer website). The Southern body is sensitive to concerns about "taking over" the North and is anxious to proceed through consensus, with the two Northern groupings preserving their identity.

Licensed trade federations

The Belfast-based [Federation of the Retail Licensed Trade](#) (FRLT), the representative body for publicans in the North, has frequent contact with the [Vintners Federation of Ireland](#) (VFI), which represents owner-operated pubs outside Dublin, and also deals to a much lesser extent with the [Licensed Vintners Association](#) (LVA) which represents the pub sector in Dublin (dominated by multiples). The FRLT was instrumental in expanding the UK-wide industry body some four years ago to become the [UK and Ireland Licensed Trade Association](#). Formal meetings between the FRLT and the VFI take place twice yearly at secretary level and twice

at officer level, but the respective offices are in contact by telephone on a weekly basis. The main current matters of common concern are legislative issues coming from Europe; the Northern Federation was disconcertingly candid in describing as "a major problem" the new race relations laws in both jurisdictions, which it claimed have resulted in "thousands" of legal actions by Travellers alleging refusal of service. The FRLT is not actively involved in any other tourism-related bodies.

Farmhouse and country holidays

[Irish Farmhouse Holidays](#) has been in existence as a marketing association (the IFHA) since 1996, although farmhouse holidays have been promoted for about 30 years. The IFHA has over 500 members and is administered by a limited company, Irish Farmhouse Holidays Ltd. It is active in 25 of the Republic's 26 counties but has no Northern Ireland members, nor does its website provide any information on or links to the North (notwithstanding the absence of a border on its map of the island). In fact, as the IFHA is presently constituted it is impossible for Northern establishments to join, since a requirement of membership is approval by Bord Fáilte's agent, Farm and Country Standards Ltd, which does not operate in the North; moreover membership of any body with similar aims, for example any Northern-based farmhouse holiday group, is disallowed under IFHA rules. It would thus be impossible to extend this successful marketing venture to the North without a substantial reform of the IFHA constitution, and it is not clear that individual IFHA members would perceive any net benefit in opening up their market to Northern competitors.

Meanwhile in the North the [Northern Ireland Farm and Country Holidays Association](#) (NIFCHA) has been in existence for about 30 years and has around 180 member establishments. Its website provides links only to the NITB and to the Northern Department of Agriculture, with none to any establishments or organisations over the border. However NIFCHA used to take out paid advertising in the IFHA's materials, and it currently advertises in the Town and Country Homes brochure (see above). The Northern group has cordial relations with its Southern counterparts; there are occasional visits in either direction to exchange information, and Southern publications are made available by the NIFCHA at venues such as the Balmoral agricultural show. As mentioned above, discussions are continuing about closer links with Town and Country Homes.

The National Rural Tourism Co-operative Society of Ireland, formed in 1990 and funded under the EU's LEADER II rural development programme, is a federation of co-operatives of accommodation owners and community-based tourism product providers. It offers a central reservation service and runs a direct sales initiative with some 40 tour operators from Britain, Continental Europe and the USA. Its [Irish Country Holidays](#) marketing brand represents around 250 tourist board-approved self-catering or bed-and-breakfast holiday establishments, in the Republic and the North. However the current Northern membership consists of just four rental properties and one B&B, all in Fermanagh. The organisation is very interested in extending its membership in the North but this depends on the creation of local co-operatives or limited companies representing accommodation providers: the usual model in the South is on a county basis, but that is not a requirement.

Other marketing groups

###Some of the smaller, up-market groupings in this sector function on an all-Ireland basis, although generally with much higher Southern participation.

The first such organisation to bring in a Northern property, [Ireland's Blue Book](#), describes itself as "a unique Association comprising Ireland's most gracious Country Manor Houses, Castles and Restaurants". It currently includes 34 properties, of which only one is in the North.

[The Hidden Ireland](#) is a marketing group of 37 private country houses, of which two are in Northern Ireland. The marketing group includes a [Holiday Rentals](#) section featuring 40 properties, of which three are in the North. Hidden Ireland shares an address (and overlaps in membership) with another network, [Really Special Accommodation in Ireland](#), managed by Specialist Accommodation Approvals, but its 136 members (including health farms, historic buildings, language schools, restaurants with rooms, and other out-of-the-ordinary establishments) are all in the Republic. A third associated venture, [Great Fishing Houses of Ireland](#), has 21 members, again all in the South.

The [Family Homes of Ireland](#) marketing collective, representing B&B and self-catering providers, has subscribers in 25 of the 26 counties in the Republic and four of the six in Northern Ireland (at present B&B only). Its brochure is distributed in both jurisdictions. Notwithstanding references in its website to "our Taoiseach" and brochure pricing stated in Irish pounds, but not in sterling, the group is keen to present itself and develop as an island-wide organisation, and has marketed its services to all NITB-registered B&B providers. However it has to date secured only about 20 Northern members, as against some 900 B&Bs and 200 self-catering premises in the South. Partly because of the currency differential, its punt-priced vouchers are not accepted by any Northern participants.

The [Friendly Homes of Ireland](#) marketing group, based in Dublin, represents country houses, country inns, self-catering premises and family-run hotels. Its members include nine establishments in Northern Ireland (which its website treats as a separate region), and the site gives details of a number of other Northern accommodation providers and tourist attractions.

The CMV [Hotels of Ireland](#) group, managed by CMV Provident Society Ltd, consists of three "collections": Coast & Country Hotels, Manor House Hotels and Village Inn Hotels. It is an island-wide group, based in Dublin, with 60 member hotels, of which five are in Northern Ireland. The [Green Book of Ireland](#) network of "private hotels, castles and country houses of character" has 12 hotels and a barge, all in the Republic.

Hostels

[An Óige](#), the Irish Youth Hostel Association, has 34 member hostels. Its website provides a link to its Northern counterpart, the eight-hostel group [Hostelling International Northern Ireland](#) (HINI), and this is reciprocated (although the HINI site includes a peculiar map of Northern Ireland represented as an island). Neither site offers any other information on or links to the other jurisdiction. Both are members of the global federation, [Hostelling International](#), although only An Óige is in the [European Union Federation of Youth Hostel Associations](#) (EUFED). We are informed that there are frequent contacts and that many hostels in either jurisdiction supply promotional material for their counterparts.

[Celtic Budget Accommodation Centres](#) is a small marketing network of 10 holiday hostels has nine establishments in the Republic and one in Fermanagh. Its [website](#) gives links to Bord Fáilte, Aer Lingus and various sites from the Republic, but has nothing on the North.

There are around 160 independent holiday hostels in the island as a whole. Of these 145 are members of [Independent Holiday Hostels of Ireland](#), including eight in the North.

Restaurants

There are not as yet any significant linkages between the [Restaurants Association of Ireland](#) (RAI) and the [Restaurateurs Association of Northern Ireland](#). The RAI is a much larger organisation, with 450 members and a wider role including labour relations, information, lobbying, publishing and representation of the restaurant sector on tourism-related bodies

such as CERT, the ITIC and European groupings. The Northern grouping is small, has no full-time staff and has a low profile within the tourism sector. The RAI has tried to interest Northern firms in ventures such as its *Dining in Ireland* guide, but despite an initial offer of free advertising space only one or two establishments came back for paid advertising. In June-July 2000 the RAI's 'Féile Bia' promotion (a week-long celebration of indigenous cuisine) is expected to attract participation from only a few Northern restaurants (and some members of the NIHF and the Northern Ireland Chefs Association), despite an island-wide publicity campaign including Belfast commercial radio advertising. The RAI is generally positive about the idea of cross border linkage but it has not detected a corresponding enthusiasm in the North.

Heritage holidays

The [Heritage of Ireland](#) website, having been created by the South's [Department for Arts, Heritage, the Gaeltacht and the Islands](#), might be expected to have a wholly Southern focus but in fact it gives information on a number of heritage attractions in the North ("the six counties") and [links](#) including two for the North and four for the OTMI sites. Some of the Northern attractions were listed as participants in the September 1999 Heritage Week, including the Orange Order museum at Dan Winter's Cottage (helpfully translated into Irish as Báile Shinsir Dan Winter). Details were also given of the North's historic buildings open week. We were unable to establish how the relatively few Northern events and attractions came to be included.

[Heritage Towns of Ireland](#) is a marketing initiative providing information on 27 towns and cities, none in Northern Ireland (and all but three in the southern half of the island). The site does, however, provide a number of Northern [links](#).

Visitor attractions

The [Visitor Attractions Association of Northern Ireland](#) (VAANI), founded in 1995 with NITB support, represents over 90 attractions such as museums, country parks, heritage centres and open farms. Its website contains no Southern links. We have no information on any equivalent body for the South. The major difference between the two jurisdictions is that in the North most visitor attractions are publicly owned and sustained by subsidy, as a way of enhancing the overall value of the tourism product, whereas in the South most are profit-making.

The Dublin-based [Access All Areas Project](#) is involved in compiling a Disabled Tourist Amenity Directory to provide information on wheelchair-accessible tourist attractions in both Irish jurisdictions.

Travel agents and tour operators

The [Incoming Tour Operators Association](#) (ITOA) represents companies involved in the overseas marketing of Irish tours and holidays; its 36 members deal with around 300,000 visitors a year. It has at present no members in Northern Ireland but it fully expects to recruit in the North once the incoming tour sector begins to develop. There is nothing in its structure or statutes preventing it from operating on an all-island basis and there is no equivalent body in the North.

The differing regimes in respect of licensing and bonding of travel agents limit the scope for change in the present system whereby most Northern Ireland agents belong to the [Association of British Travel Agents](#) (ABTA) and Southern ones to the [Irish Travel Agents Association](#) (ITAA).

Work at European level *

The Confederation of National Associations of Hotels, Restaurants, Cafés and Similar Establishments in the European Union and European Economic Area, mercifully abbreviated to [HOTREC](#), has two member groups from the Republic, the IHF and the Restaurants Association of Ireland. Unlike European lobby groups in some other industries, HOTREC does not function effectively as a way of bringing together representatives from both parts of Ireland. The British members are the [British Hospitality Association](#) (BHA), representing the hotel, restaurant and catering industry, the [Brewers & Licensed Retailers Association](#) (BLRA), the trade association for pub-operating and brewing companies, and the Restaurant Association of Great Britain (RAGB). The BHA members in Northern Ireland include companies such as Bass, Jury's Doyle, Hilton Hotels and Skandia Restaurants as well as the Northern Ireland Hotel and Catering College in Portrush and at the University of Ulster at Jordanstown. The BLRA has a couple of member companies in Northern Ireland and co-operates with two industry bodies, the Federation of the Retail Licensed Trade (NI) and the Northern Ireland Drinks Industry Group.

Since the production of this report the British Hospitality Association (BHA) have signed an affiliation agreement (9th February 2001) with the Northern Ireland Hotel Federation (NIHF) to represent them in Westminster and in Brussels (via HOTREC). The NIHF continue to deal with devolved tourism and hospitality issues in Northern Ireland.

Language-based tourism

Until perhaps 20 years ago, language learning holidays in Ireland would have referred mainly to teenagers from within the island, participating in (sometimes Spartan) summer schools in Gaeltacht areas; they may not always have recognised their experience as a holiday, or themselves as tourists, whether or not they fitted the official definition. In the intervening period the Gaeltacht experience has remained a rite of passage for many youngsters, with an increasing and well-served market for adult learning holidays, but there has also been a phenomenal growth, so far largely restricted to the Republic, in English language learning holidays. These areas offer enormous scope for cross border co-operation, to the particular potential benefit of the North and West of the island.

English language learning

The Republic's [Department of Education and Science](#) is represented on an Advisory Council for English Language Schools (ACELS), which advises the Department on whether to certify establishments offering year-round or summer schooling. At present, DES-approved schools number about 189 (117 summer-only and 72 all-year, owned by a total of 116 organisations). Visitor numbers are the subject of some debate—Bord Fáilte, for example, declines to count under-16s who represent possibly one-third of the customer base—but the most recently published estimates suggest that that the schools bring in in the region of 139,000 over-16 students per year. Even though, in most cases, the students lodge with host families or in university rooms rather than in tourist board-registered accommodation, this represents a vast source of revenue. The students from the EU mainland typically stay for two or three weeks and average spend per head, according to BFÉ in 1993, was over IR£1,000—and those from further afield may stay for six months to a year. In 1993, the last year that BFÉ undertook a proper research exercise, the value of the sector (this time including the under-16s) was "conservatively" put at IR£109m.

English language teaching (ELT) has outperformed almost every other segment of the tourist industry in recent years. The industry organisation, [MEI~RELSA](#) (Marketing English in Ireland—Registered English Language Schools Association), which represents the majority of approved providers, now reckons that spend per head exceeds £1,240. On their estimate of 185,000 students this gives a tourism earnings figure of £230m. This, astonishingly, represents 11 per cent of the Republic's total tourism revenue, putting ELT on a par with the combined revenue from angling, golf and cycling holidays (which together attract around four times as many adult visitors). This (1998) estimate does come from a marketing organisation seeking increased state support, but since it is extrapolated from official data with reasonable adjustments for growth, there is no reason to doubt its accuracy.

It is not surprising that the sector is grossly underdeveloped in the North by comparison with the Republic or the south of England. Thirty years of violence have not provided an incentive for European parents to despatch their offspring to Belfast. There are, however, a small number of schools in the North, and a stabilisation of the political situation will open up the market.

The existence of ACELS as an industry-wide, state-approved advisory body, and of RELSA as a trade association and pressure group, with MEI as its marketing arm, offers obvious potential for the Northern providers to simply 'plug in' to an all-island structure. It is not, of course, as simple as that. The main hurdle is probably certification. The [British Council](#), whose branding gives worldwide recognition, has only two registered schools in the North: the University of Ulster's [Centre for English Language Teaching](#) (CELT) and the [TEFL Centre](#) at Queen's University are registered through the Council's associate, [BASELT](#) (British Association of State English Language Teaching) for public-sector providers, but to date none of the 7 or 8 commercially-run Northern schools have thought it worthwhile to affiliate to [ARELS](#) (the Association of Registered English Language Services), the equivalent body for the private sector.

Attempts have been made to draw the Northern providers together, but the Northern Ireland Tourist Board has been, to say the least, unenthusiastic. It has declined to establish a product marketing group unless and until there is a critical mass of registered schools; not only are the private operators unregistered, but they are somewhat wary of the universities as competitors. NITB has provided a small (inaccurate and out-of-date) [listing](#) of summer schools on its website, without even hyperlinks to the registered schools. Among the other tourism support organisations, the [International Fund for Ireland](#) has shown some interest, with a small grant to CELT to market north coast learning holidays to Germany. The universities have participated, with other BASELT members, in a small marketing exercise in Poland, and they work co-operatively as an embryonic Learning English in Northern Ireland group.

As to the possibility of linking with the MEI network, the main drawback is the administrative and political difficulty in extending the Republic's Department of Education recognition to schools outside the state. That could, perhaps, be overcome if the Northern [Department of Higher and Further Education, Training and Employment](#) were to appoint an inspector to the ACELS board, but that would require a ministerial initiative. CELT and the QUB Centre have enquired about some form of associate membership of MEI, but there seems to be little likelihood of progress until a restoration of devolved government, and the galvanisation of the NITB approach through the new cross border tourism company. There are rumours within the industry that the British Council may be planning to extend its accreditation service to institutions in the South meeting what it regards as its higher certification standards, but while that would allow the relevant institutions to avail of the Council's global network, it would not necessarily hasten progress towards an island-wide system, and might in fact act as a disincentive. Just as there is a certain amount of political resistance in the North to the concept of certification by the Southern agencies, some providers in the Republic would be uneasy about a British kitemark, and feel that it would dilute the Irish image on which their current marketing strategy is based.

The present situation is that, excluding students on ERASMUS and other exchange schemes, the North's ELT market is probably in the high hundreds per year, possibly just into four figures. There appear to be no centrally-collated statistics. The TEFL Centre at Queen's recognises the main barrier to growth as being the 'negative image' of Northern Ireland internationally, but it feels that a possible solution is for Northern educational providers to team up with Southern ones to offer students a 'taster' stay; the TEFL Centre is currently setting up such a venture with [University College Cork](#). The strength of sterling against the punt is a further disincentive, but that is perhaps temporary and there must be room for a very large expansion of this segment over the next few years.

Irish language

A new cross border implementation body with the potential to contribute to tourism is the North-South Language Body, which mainly exists to promote the Irish language (in which the Body is known as An Foras Teanga) but which will also promote the Ulster-Scots dialect, also called Ullans (in which the Body is known as Tha Boord o Leid). (In a strict sense the Body exists to promote both, but its legal functions are much more extensive in relation to Irish and that side of its activities will have considerably more staffing and financial resources.)

There are already a number of organisations promoting the Irish language as the basis for educational holidays, mainly marketed at residents of both jurisdictions on the island but also attracting what is generally agreed to be an increasing level of participation from overseas. Most of the provision is via immersion courses in Gaeltacht regions (Donegal, Galway, Cork) but there are providers that offer Irish teaching as a component of activity holidays. These include organisations in non-Gaeltacht areas of the South, and voluntary organisations and cultural centres in the North where the Irish language 'movement' is undergoing a renaissance associated with the growth of Irish-medium schooling. A member of the North-South Language Body assured us that "the infrastructure is already there" to develop language-based tourism for the global market, and the Body's predecessor in the South, Bord na Gaeilge, had already begun to explore the potential through a marketing trip to Milwaukee (the USA having around 40m inhabitants admitting to Irish descent).

It is, however, rather difficult to quantify either the current value or the potential of Irish language-based holidays. We were unable to find precise, centrally-collated statistics (there is a degree of competition among Irish-language organisations, and some are coy about releasing commercially-sensitive data), but we believe that a fair annual estimate of the current Irish language-based holiday market is between 20,000 and 25,000 teenagers and 4,000 to 6,500 adults (of which about half are on cultural, craft, walking or other activity holidays where Irish is a major component). In economic terms the adult market is much more significant, and one of the largest providers confidently estimated the total number of overseas participants as being in the 2,000 to 2,500 range. However a smaller organisation estimated its 200 participants as including only 10 per cent from overseas, and suggested that the total from overseas would be in the hundreds rather than thousands.

In relation to Ulster-Scots, it is too soon to envisage a significant language-learning holiday market.

It may be that the new Body feels that its remit in supporting and promoting the use, teaching and learning of Irish, and "awareness and use of Ullans and of Ulster Scots cultural issues", is broad enough to keep it busy without devoting much attention to the tourism potential. However there is nothing to prevent it engaging with the existing providers of language-based holidays, and with centres and organisations on both sides of the border capable of adding to that provision, to develop a marketing strategy in conjunction with the two tourist boards and/or the new island-wide tourism company. Grant-awarding agencies have already recognised the potential of the sector: the IFI, for example, gave IR£56,000 towards the development of an [Oideas Gael](#) centre in Donegal in 1995.

As a final note on this matter, tourism in minority language areas is sometimes seen as a mixed blessing, but when the tourists are attracted specifically to learn the language and appreciate the culture the impact must be less harmful than that of coachloads of short-stay monoglots.

CROSS-BORDER INITIATIVES

- *Co-operation Ireland*
- *IFI*
- *LEADER*
- *INTERREG and ERDF*
- *EUSPPR*
- *Future co-operation on EU funding*
- *Waterways Ireland*
- *sectoral and local initiatives*

Co-operation Ireland

The [Hospitality Ireland Initiative](#) is an island-wide venture, sponsored by the cross border charity [Co-operation Ireland](#), to promote networking among people involved directly in the industry and in tourism training and education. It organises courses and seminars for hotel and tourism practitioners from North and South, to discuss the potential for cross-border co-operation in tourism development and marketing, and provides the secretariat for a North-South hospitality educators' forum. The initiative, launched in 1993 as a discussion forum for industry groups (the Irish Hotel & Catering Institute and HCIMA), has evolved more recently into a structure for promoting practical co-operation on the ground. It currently has three main facets. A Cross Border Tourism Leadership Programme, based in the North-West and funded by BFÉ and the Training and Employment Agency, brings together about 20 representatives from the industry to work on building expertise and linkages. A Community Festivals Networking Programme, with about 400 participants, provides training on issues such as health and safety, and promotes staff exchanges and best practice. Finally the educators' forum, with about 20 members, promotes cross border student exchanges, institutional links and placements.

(The network should not be confused with the Northern Ireland-based *Hospitality Ireland* magazine or the commercial [website](#) of the same name, both of which provide news and features on the tourism industry.)

Co-operation North, as the organisation was known until 1998, was also involved (with the IBEC-CBI Joint Business Council) in the administration of Measure 3:1 ([Cross-Border Business and Cultural Links](#)) of the [European Union Special Support Programme for Peace and Reconciliation](#) in Northern Ireland and the Border Counties of Ireland (EUSPPR, sometimes also referred to as PEACE). Although tourism projects *per se* were excluded from Measure 3:1, among the 300 projects assisted were a small number (<10) that created linkages between tourism-related companies and cultural groupings on either side of the border. The amounts involved were not high and the Measure closed at the end of 1999. While Co-operation Ireland would like to see a similar Measure in the expected PEACE II package, and

it has made representations to government on the matter, it does not see the need for any change in the treatment of tourism-related businesses and cultural groups.

IFI

The [International Fund for Ireland](#) (IFI), created by the British and Irish governments in 1986, had by end-1999 provided some £303m to over 4,400 projects, leveraging twice as much again in investment from government, private and community sources. (All amounts in this section expressed in sterling.)

The Fund has supported a large number of tourism-related projects in Northern Ireland and the six Southern border counties, but most of these are wholly located in one jurisdiction or the other rather than being overtly cross border. Total disbursements for what the IFI itself defined as tourism projects in 1986-1999 were £46m, stimulating a total investment in the region of £140m. However it should be noted that there were direct or indirect contributions to tourism development through many projects funded under other headings, such as urban development, the Wider Horizons community capacity building programme, 'flagship' projects such as visitor centres, and projects aimed at the regeneration of deprived areas. Examples are grants for refurbishing buildings for hotels, US training placements for the hospitality sector, and the development of sports and leisure training facilities. While we have not endeavoured to produce a precise breakdown, our estimate is that the total value of IFI grants to tourism exceeds £55m, with the multiplier effect giving it a value in excess of £165m.

The tourism programme of the Fund is administered in partnership with the Northern Ireland Tourist Board and Bord Fáilte, and there are mechanisms in place to ensure that there is a reasonable degree of cohesion in terms of the criteria applied and to address issues of complementarity, duplication, competition and integrated development on either side of the border. All applications go through a four-stage process: the first stage is handled separately in each jurisdiction, in that initial applications are considered by each tourist board and a view is reached on whether or not it should be recommended for support. In the second stage, all applications are considered by a Tourism Programme Team with representation from the IFI and from NITB, BFÉ, the Department of Tourism and its Northern counterpart, the training agency CERT and the North's Training and Employment Agency. This group jointly assesses all applications, taking account of (but having the authority to override) the recommendation of the 'parent' tourist board. The recommendations from this group are then forwarded to designated board members of the IFI, and in the final stage, the full IFI board makes the actual funding allocations. As a further safeguard against the application of different criteria, the BFÉ and NITB officers occasionally exchange a sample of applications for cross-checking.

The Fund has aimed to raise the quality and standards of tourism attractions, information and accommodation. It has also provided training to ensure that the skills and expertise are available to meet the growing demand of tourists. Many Fund-supported projects have benefitted local communities as the economic spin-off from their tourism developments is realised. There can be no doubt that IFI initiatives, including strategies to extend the tourist season and to develop the Northern coastal counties, have had a highly beneficial impact, but it is also clear that the impact has mainly been on localities rather than in terms of promoting an island-wide co-operative approach. It does not follow that the IFI should be criticised for this; it is helping to create and enhance the infrastructure which has to be there if co-operation is to mean anything.

Looking in more detail at the five years 1995-1999, total IFI grant aid to tourism projects was in the region of £16m, of which about £8m (50%) went to projects impacting on the Northern side of the border and £3.5m (22%) to the South. Around £4.5m (28%) went to

North-South projects, meaning local projects clearly impacting on either side of the border, and joint projects between the two jurisdictions such as international marketing work. (Our estimates do not tally with the IFI accounts because we have included tourism-related 'flagship' projects; have not strictly followed the IFI definitions of North, South and North-South projects; and have not adjusted precisely for currency differentials.)

The scale and emphasis of IFI tourism grant aid, and the proportion going to North-South projects, has changed over the five years in question (see table, which relates to actual disbursements and is based on our estimates rather than the official IFI breakdown). Perhaps surprisingly, there has been a very marked decline in the proportion going to cross border projects. The two major elements of cross border funding were a Human Resources Development programme and a Joint Marketing Programme, both of which ended in 1997. The Fund's 1998 Annual Report acknowledges "a major development in the structure of the [Tourism] Programme" during the year, but fails to explain the virtual abandonment of cross border working.

Year	Tourism grants	North-South projects
1995	£4.3m	43%
1996	£4.1m	35%
1997	£4.1m	29%
1998	£1.4m	4%
1999	£2.3m	<1%
1995-99	£16.2m	28%

Since 1997 the only significant disbursements which meet our narrow definition of North-South projects have been £20,000 for a joint marketing exercise for two holiday cottage complexes, and £47,000 towards a Shannon-Erne walking trail. It could be argued that the total IFI assistance to the should be considered as cross border work, but the rest of the 1998-99 investment there came to only £328,000, the vast majority of it spent in local Southern projects with no direct impact on the Northern side. BFÉ suggests that the explanation is that recently the IFI has concentrated on the upgrading of hotels, and grants under that heading are necessarily attributable to one jurisdiction or the other.

LEADER

Within the EU's main rural development funding line, LEADER, rural tourism has received significant support, accounting for almost a quarter of funding under the LEADER II programme now coming to an end (50 MECU or Stg£35m approximately, of which about 20 MECU came from the EU and the balance from national matching funds). As mentioned above, two collective bodies (Irish Farmhouse Holidays and Irish Country Holidays) were funded to facilitate, promote and market the rural tourism concept, particularly through the local group or co-operative approach.

Under the Republic's last National Development Plan (NDP), the [Department of Agriculture, Food and Rural Development](#) channelled LEADER funding to rural tourism projects, which were also supported at national level by an Agri-Tourism Programme. Under the new NDP, rural and agri-tourism will continue to receive support but the amounts and schemes have yet to be finalised.

In Northern Ireland, the new [Department of Agriculture and Rural Development](#) (DARD, formerly DANI) also managed LEADER support for tourism projects. In the North the value of LEADER II was around Stg£14.5m, of which a higher proportion, 65%, came from the EU and the balance from the UK exchequer. As in the Republic, the aid was disbursed through local action groups (LAGs) or companies, which had quite substantial leeway to decide on their own operational strategies. (A smaller amount from the Department's own resources is being disbursed to projects, some with a tourism element, through Area-Based Strategy Action Groups in nine disadvantaged areas.)

Details of tourism-related grants have not yet been collated by the respective Departments and in the time available for this study we have not been able to assemble the data from the individual LAGs. We are, however, advised by DARD that a large number of small-scale projects were supported under the Rural Tourism Measure of LEADER II, mainly for marketing and for the conversion or modernisation (but not construction) of buildings to provide tourist accommodation.

In terms of North-South working, while LEADER II contained a specific funding line for cross border projects (or projects involving other EU countries) its impact on tourism was minimal. There has existed since about 1993 a Cross-Border Steering Group on Rural Development, in which the two Departments exchanged information and ideas, but there was no formal North-South policy co-ordination in relation to tourism aid. It is known that the Minister in the suspended Executive, Brid Rodgers, was interested in expanding the role of this body, and the establishment of the [EU Special Programmes](#) implementation body may also result in a much greater degree of co-operation and cross border funding in respect of the forthcoming LEADER+ initiative. DARD anticipates, however, that the inclusion of a dedicated Natural Resources and Rural Tourism measure under PEACE II will result in LEADER+ funding steering away from tourism, except perhaps in areas outside those designated for this form of PEACE II support. Again, much will depend on the approach taken by individual LAGs.

INTERREG and ERDF

The Tourism Measure of the Northern Ireland/Ireland INTERREG II Programme, 1994-99, was designed to develop and market the border region as a quality holiday destination. The three principal eligible activities were: natural resources and activity tourism; heritage and cultural tourism; and joint or co-operative marketing and visitor services. For the six southern border counties (Cavan, Donegal, Leitrim, Louth, Monaghan and Sligo) the full allocation of IR£7.201m was provided through Bord Fáilte to over 50 tourism projects, including capital development and marketing initiatives.

INTERREG-backed projects in the tourism area have concentrated on the development of the Erne cruiser fleet (including a £10m marina at Kesh) and on the creation of caravan pitches in key tourist areas. Assistance has also been approved for upgrading tourist information centres, developing local marketing plans and developing cycle routes. Surprisingly few projects have had a specific cross border dimension, as opposed to impacting locally on one side of the border, and some of the funding has gone to towns far from the border, such as Carrickfergus. Among those with a cross border element were the North West Passage initiative (see below) which received over £140,000 in 1995-2000; claims outstanding included five other North-South linkages all involving sums below £26,000.

It is expected that support from the EU for tourism development through new INTERREG III Programmes will continue in the period 2000-2006. The draft programme guidelines have just been issued but applications are not yet being invited.

The INTERREG IIC [Atlantic area programme](#) has as Partner Member States: all of the Republic of Ireland, part of the UK (Northern Ireland and the western half of Britain), all of Portugal, Spain (except Catalonia) and France (Atlantic coast). One of the four Priorities defined for the programme have Measures relevant to the tourism sector, as follows: **Priority / Tourism: Measure: Promotion and diversification of tourist supply.** seeks to support and expand efforts to promote and diversify tourism with a quality image, using the resources that the Atlantic regions have. There is also a **Priority / Modes of transport and transport infrastructures** with three Measures with some relevance to tourism, that may be dealt with in a future CCBS study (*Measure: Strategic studies of a cross-sector nature:* deals with integrated and sustainable development of the transport system; *Measure: Maritime Transport:* seeks to study ways of increasing the regions' share of world traffic, to promote interregional coastal trade, to study specialisation of ports and ways of improving connections between hinterlands, to develop links between agents and between infrastructures, and to improve links between harbour-related and urban activities; *Measure: Air links:* encourages links between airports and among airline companies in the region, thus relieving congestion in major airports).

A separate INTERREG [programme](#) has been running since 1994 between the south-east of Ireland and Wales, including tourism and cultural co-operation initiatives, but this falls outside the scope of our study.

Some monies have also been made available through European Structural Funds for tourism-related projects in Northern Ireland. Measure II of the 1994-99 European Regional Development Fund (ERDF) provided a small amount (peaking in 1996 at £4.4m) towards tourist amenities, and Measure III a much smaller amount (£0.7m in 1996) towards upgrading tourist accommodation.

EUSSPPR

The [European Union Special Support Programme for Peace and Reconciliation](#) (EUSSPPR, or PEACE) has provided funding (usually up to 75 per cent) to a large number of initiatives with a tourism element. The seven Sub-Programmes in the original (1995-99) EUSSPPR contained 26 separate Measures, of which only two were specifically focused on tourism (namely 2(B)3: Fisheries and Aquaculture and Water-based Tourism (Northern Ireland) and 2(C)1: Urban Renewal, Tourism, Agritourism and Rural Infrastructure (Border Counties)), but other Measures were used to access funding for community projects, infrastructure development and other projects impacting on tourism. (See [above](#) for Measure 3:1.) It is expected that a replacement Programme, sometimes referred to as "PEACE II", will come on stream in late 2000 and that this will also support tourism-related projects.

Most of the funding in the initial EUSSPPR was for fairly small-scale projects, and usually focussed on a locality on either side of the border rather than cross border work. We have information on 108 projects funded through the Monaghan EUSSPPR office with a tourism element funded between 1996 and 1999. The actual total is likely to be considerably higher, since a large number of projects with tourism content were funded through the various Northern Ireland government departments, state agencies and Intermediary Funding Bodies; at the time of writing it had not been possible to assemble a list of these. It has to be said that the EU culture of transparency has not fully permeated the Northern Ireland bureaucracy, so that we were repeatedly told by public servants that information on this line of public funding was not available to the public. We have secured only partial documentation in time for this study.

Of the 108 Monaghan-funded projects only 29 were described as impacting on counties on either side of the border, with the remainder impacting on one jurisdiction only. Of the 29, a

substantial proportion were clearly going to have much more impact on one side of the border than on the other. The only really large grants with a cross border element were for an education programme based at the Navan Centre in Armagh (IR£153,000), a cross border cycle trail (IR£100,000), and an activity and cultural tourism training programme (IR£150,000). Other large projects involved the construction of community resource centres and visitor facilities, with little prospect of cross border impact.

We have information from the North on only 25 EUSSPPR-funded tourism projects (not corresponding precisely with the 29 in the Monaghan list). Most of these were relatively small grants (£15,000 or less) and again most had a local focus. Projects with an obvious North-South element included a Cross Border Community Tourism Initiative based in Louth (£16,500), an Erne-Shannon Festival (£7,500), a feasibility study on cross border tourism links (£6,500) and a Christian heritage project (£15,000). While an Inishowen tourism project received £100,000 of core funding, a separate grant of only £3,000 covered its cross border work.

Future co-operation on EU funding

One of the six cross border implementation bodies created pursuant to the Good Friday Agreement was given responsibility for the delivery of various aspects of the Special EU Programmes, including several with a potential impact on future funding for tourism-related initiatives. The December 1998 agreement on the functions of the new body, legislated for at Westminster and in Dublin in early 1999, defined its role as including for the current INTERREG and PEACE programmes, "administration of certain sectoral sub-programmes [including] cross-border co-operation between public bodies".

It would also assume, for the current programmes, "the central secretariat, monitoring, research, evaluation, technical assistance and development roles currently exercised jointly... by the Department of Finance and the Department of Finance and Personnel"; and in respect of the anticipated future EU programmes—INTERREG III, LEADER+, EQUAL and PEACE II—the new body would retain these roles. It would, in addition, be responsible for advising the NSMC and the Northern and Southern Departments of Finance on negotiation of EU funding, and preparing detailed programme proposals under the expected programmes. It would be directly involved in "grant-making and other managerial functions in respect of INTERREG III and of north-south elements of programmes under other initiatives, within the framework of the relevant overall policies of North and South respectively".

The new structure offers at least the possibility of a much higher degree of co-ordination and consistency in channelling EU funding to tourism-related initiatives on either side of the border. It will also impact on the 'market' in terms of motivating those who apply for grants, in that, notwithstanding the reference to the respective "policies of North and South", it is likely to result in an increased proportion of funding applications building in a genuine cross border element in the hope of hitting the right buttons on both sides.

While the various departments are still drawing up strategy documents on the distribution of the new funding lines, it is known that, at least in the North, support for rural and agri-tourism is likely to shift from LEADER to PEACE. The expectation is that a Measure of PEACE II will support rural tourism projects in five areas, designated Areas of Outstanding Natural Beauty, with input from the Department of Agriculture, the Environment and Heritage Service and the NI Tourist Board. We have not established whether the South is contemplating a similar shift, nor the extent to which rural tourism policy will be co-ordinated between the two jurisdictions.

Waterways Ireland

The restoration and promotion of canals and waterways as a recreational resource has been one of the largest, and most successful, experiments in North-South co-operation in the field of tourism.

The Ballinamore & Ballyconnell canal was reopened in 1994 as a result of the investment of £30 million, including £6m from the [International Fund for Ireland](#) (IFI) which separately funded a marketing initiative. The canal linked the Shannon and Erne water systems, creating a 200-mile stretch of navigable canals, rivers and lakes. The reopening of what became known as the Shannon-Erne Waterway (by the then Foreign Minister Dick Spring and Northern Ireland Secretary Sir Patrick Mayhew) provided a major boost to tourism and employment in the hospitality, leisure and heritage industries on both sides of the border. Within a year almost 4,000 boats per annum were using the waterway, bringing around 15,000 visitors. The value of the project was further demonstrated by the development within two years of over 50 new secondary projects along its corridor, bringing significant economic regeneration to the border counties of Leitrim, Cavan and Fermanagh.

In 1998 the IFI opened a new line of funding for Shannon-Erne Waterway projects, but most of that (nearly 80 per cent in the first two years) has gone to local projects on the Southern side with no clear benefit to the North except in terms of enhancing the whole border region tourism product.

The early 1990s also saw the commencement of restoration work on both sides of the border on the Ulster Canal, assisted by the IFI and European funding.

Responsibility for the maintenance and development of inland navigable waterways throughout the island was transferred (pursuant to the Good Friday Agreement) to a new cross border implementation body, Waterways Ireland, with effect from April 2000. Ministerial oversight of the new agency rests with the [Department of Culture, Arts and Leisure](#) (DCAL) in the North and the [Department for Arts, Heritage, the Gaeltacht and the Islands](#) in the South. It will assume all the functions of the Waterways Service (which had been part of the latter Department since 1995) and the waterways functions of the Rivers Agency of the North's Department of Agriculture; it will also take over the functions of Shannon-Erne Waterway Promotions Ltd, the cross border company established to market the region as a tourist destination.

The 1999 intergovernmental [agreement](#) establishing Waterways Ireland defined its functions as follows:

Management, maintenance, development and restoration of the inland navigable waterway system throughout the island, principally for recreational purposes: immediately in respect of the Shannon-Erne Waterway and of the possible restoration and development of the Ulster Canal; progressively thereafter, in respect of the wider Shannon-Erne system and the island's other waterways (principally the Royal Canal, Grand Canal, Barrow and Lagan).

The survival of navigable waterways was due in large part to the efforts of the [Inland Waterways Association of Ireland](#) (IWAI), founded as a discussion forum and pressure group in the Republic in 1953; it became a cross border organisation when a Lough Erne branch was formed in 1979 (now the Northern Ireland branch). In 1984 the Association elected its first Northern president, and subsequently the IWAI worked with the Ulster Canal Group and other Northern bodies on the revival of the North's canal system—a cause taken up in 1994

by the Ulster Waterways Group. The IWAI and its website now act as a point of contact for all those interested in waterways and water-based tourism in Ireland.

Sectoral and local initiatives

Air transport

The development of [City of Derry Airport](#) has been recognised by the government of the Republic as contributing to the tourism potential of the north-western border region. The project received funding under the EU Special Support Programme for Peace and Reconciliation, and in 1998 [Derry City Council](#), the owner and operator, secured a matching financial contribution (of IR£1.5 million, paid in 1999) from the Republic's government. Before the suspension of the Northern Ireland Executive the Regional Development Minister, Peter Robinson, announced plans for a further £400,000 grant to the airport, which may also be matched by the Republic. The Donegal county manager is involved in the airport's management, and Bord Fáilte, the Northwest Regional Tourism Authority and other tourism groups in the Republic have assisted its marketing efforts. At the launch of new routes to London by Dublin-based airline [Ryanair](#) in 1999, marked by a ceremony attended by Tánaiste Mary Harney and the then Secretary of State Mo Mowlam, the Tánaiste described the airport as "a model of North-South co-operation".

The viability of Derry airport would be enhanced if a Public Service Obligation were introduced to allow subsidising of a service to Dublin, and this is currently being sympathetically considered by the Republic's Minister for Public Enterprise, Mary O'Rourke (in consultation with the EU Commission and the UK authorities).

We have, however, noted above that the airport is virtually ignored in Bord Fáilte's internet marketing. It is also experiencing difficulties due to a very large over-run on the cost of capital works, partly due to environmental concerns. A more attractive "model of co-operation" could perhaps be found in the waterways.

Marine tourism and angling

As a result of the 1998 Good Friday Agreement, and a subsequent British-Irish [agreement](#) followed in 1999 by near-identical [legislation](#) in both parliaments, an island-wide implementation body for aquaculture and marine matters has been established.

Most of the functions of the new body, the Foyle, Carlingford and Irish Lights Commission, are not directly related to tourism, but one of its two operational arms, the Loughs Agency, has the potential to become an important player in tourism development. This Agency will exercise the Commission's responsibilities for promoting "the development of Lough Foyle and Carlingford Lough, for... recreational purposes" and for the "development of marine tourism". The latter will include "the preparation of a strategic plan for marine tourism in the Foyle and Carlingford Areas and the promotion and marketing of those Areas". The Commission will also be given powers in relation to inland fisheries—a major tourism resource—in all rivers and lakes debouching in the two loughs.

Pending the reinstatement of devolved institutions in the North, the Commission and the Loughs Agency have, like other cross border bodies, been unable to progress much beyond the setting-up phase. Although a restored NSMC might give it a different emphasis, the Loughs Agency does not seem at present to accord a high priority to tourism-related work. It is our understanding that it has not yet appointed anyone to work either on strategic planning for tourism or on the promotion and marketing side of its remit; and that, at

present, it intends to establish only one post for a development officer covering all of those matters for both loughs and their respective catchments. In those circumstances it could be quite some time before the new agency begins to have an appreciable impact on marine tourism and angling. In the South, however, the [Department of the Marine and Natural Resources](#) is committed to supporting the development of marine leisure and angling facilities, and it may press the Commission to devote attention to these issues.

A [training initiative](#) to support the angling sector of Irish tourism was piloted from October 1997 to May 1998. Run by CERT and the [Irish Marine Institute](#) in conjunction with agencies including Bord Fáilte, the Northern Ireland Tourist Board, the Fisheries Boards and the Salmon Research Agency, the Marine and Countryside Guide Training Programme concentrated on the development of guiding skills for ghillies, sea skippers, accommodation representatives and angling tourism agents involved in sea, coarse and game angling. The pilot programme has not been extended. The Dublin-based Marine Institute is engaged on a [strategic study](#) of water-based tourism but we have not been able to establish whether this extends to the North.

The North-West Passage

An example of a local authority-driven cross border tourism marketing organisation, the [North-West Passage](#) was established in 1982, originally as a consortium of four Northern Ireland District Council areas—Armagh, Dungannon, Omagh and Strabane. In 1987, with the support of the Northern Ireland Tourist Board and Bord Fáilte, it expanded to take in three Regional Tourism Organisations in the South—Dublin Tourism, Midlands and East Tourism and North West Tourism. The cross border grouping had a much clearer identity than the earlier formation, being based on the concept of motoring holidays taking in lesser-visited points along the route between the well-established tourist destinations of Dublin and Donegal. With the assistance of EU funding and commercial sponsorship it produced signage, a route map and a brochure of holiday breaks and tourist attractions in 1997-98. The NWP website provides details of accommodation and attractions on both sides of the border, and contact details for NITB, Bord Fáilte and local tourist information centres.

While the project remains in existence, its success in establishing the Passage 'brand' has been limited and there is a perception among some of the local interests that the funding could have been spent more effectively. Several of the local authorities along the route are currently exploring alternative arrangements, and this is likely to result in at least one bilateral cross border link within the next year. However the Passage project had political backing from elected representatives and it may remain in existence for some time.

Cavan-Leitrim-Fermanagh linkage

In 1997 Cavan County Council carried out research, in consultation with Fermanagh District Council and Leitrim County Council, on the possible development and linkage of island monastic sites on a cross border basis, including St Mogue's Island, Drumlane and Trinity Island in Cavan and Boa Island, White Island and Devenish in Fermanagh. The project did not develop beyond a preliminary study, but the idea has not been abandoned.

Cavan did, however, continue to work with Fermanagh on a small number of tourism projects. The two councils have secured INTERREG funding for a golf tournament in June 2000, and in 1999 they produced a joint brochure with funding from the EUSPPR Border Towns marketing scheme. During 1999 Cavan and Fermanagh jointly attended at least two tourism promotion events in Britain, but no joint events are planned for the current year; this is partly because Cavan's funding, planned on a two-year basis, has been fully committed, but also because of Fermanagh's concentration on its own Fermanagh Lakelands promotions.

Border networks

Tourism has been one of the matters addressed in three local government networks established on a cross border basis. The newest of these is the Irish Central Border Area Network (ICBAN), formed in June 1995, which incorporates 10 local authorities in Sligo, south Donegal, Fermanagh, Leitrim, Cavan, Monaghan, Armagh and south Tyrone. The oldest, the North West Border Group established in the 1970s, includes north Donegal, north Tyrone and Derry, and the East Border Network takes in south Down, Louth and parts of Armagh and Monaghan. The networks have mainly dealt with economic development, planning and infrastructure matters but they have provided a useful forum for discussion on tourism and related issues.

Strangford area

An interesting example of cross border working with mainly private-sector participation is the recent linkage between the [Strangford Lough Agri-Tourism Association](#), formed in 1992, based in Co. Down and having a mainly Protestant-Unionist membership, and the mainly Catholic membership of the [Fjordlands Rural Development Group](#) based in Co. Louth. The Fjordlands Partnership seeks to foster cross-border co-operation and rural development in the two areas, and the shared website provides details of and links to accommodation providers on either side of Strangford Lough. While the Partnership is active on other rural development issues, including agriculture and crafts, its objectives include the development of a distinct tourism region, extending from the Ards Peninsula in Co. Down to the Boyne Valley in Co. Louth.