



STRATEGIC SPATIAL PLANNING AND CHALLENGES FOR TOURISM DEVELOPMENT IN PORTUGAL

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Annotation: *Tourism in Portugal has been an engine of the economy during the last decade and is even considered the country's largest exporting economic activity, having achieved historical results in main indicators. The growth of this activity has produced effects in all the regions leveraging the national economy. It is important to keep in mind how to give continuity to this growth and how it fits into the spatial planning of national territory. Thus, this paper analyses the strategic challenges and the strategic instruments that have been defined as a way of planning the strategy for tourism in Portugal. The paper also presents the Portuguese territorial management system and shows how tourism planning can have an important role on the development and implementation of these instruments to achieve a sustainable regional development.*

Keywords: *Tourism, strategic planning in tourism, spatial planning, regional development, Portugal.*

1. Introduction

Strategic spatial planning is an important instrument of the economic and social policy of a country because it ensures a balanced and sustained use of the territory. One of the activities that may contribute to the development of regions is tourism, as it may be started without high investments and brings immediate benefits to the populations. Tourism development depends, in part, on some of the spatial planning instruments, as these contribute to reducing regional disparities and ensure a more harmonious and better distribution of equipment, infrastructure and economic activities.

In Portugal, tourism has been an important part of the economy for the last decade and is even considered the country's largest exporting economic activity. It facilitates the development process of many regions, without which a better quality of life for their population wouldn't have been possible.

The objectives of this paper are, on one hand, to analyse the strategic challenges and the strategic instruments that have been defined as a way of planning the strategy for tourism in Portugal. The paper also presents briefly the Portuguese territorial management system and shows how tourism planning can have an important role on the development and implementation of these of instruments to achieve a sustainable regional development. On the other hand, the paper presents some of the results achieved using these strategic planning instruments in the area of tourism, identifying the mains challenges for the Portuguese tourism in the future.

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2. Strategic planning in tourism

The success of most of local and regional rationally planned tourist destinations and the negative experience of many unplanned locations demonstrates that tourism development should be based on a planning process that includes a solid assessment of the destination resources and their attractiveness potential. According to Carvalho & Costa (2014, p. 2) strategic planning in tourism is crucial as a tool for the development of the regions, since it can help in the planning and qualification of the territory, guide public and private investment, strengthen the qualification of human resources and the development of products and destinations.

To face increasing competition, destinations need to adopt strategies and define products, services and markets to meet that challenge. Those decisions are strategic because have long term impact. According to Teixeira (2005, p. 49), strategic planning, unlike other levels, aims to anticipate the long-term future, including the definition of objectives and the ways of action to achieve them. Tourism development at the international level has increased competition between destinations, resulting in a number of positive but also negative impacts. Planning can be the answer to achieve, on the one hand, the maximization of income from this activity and, on the other hand, minimizing its negative effects.

According to Ferreira (2009, p. 1520), planning must be seen as a critical element that guarantees, in the long term, the sustained development of the tourist destination. The negative effects of mass tourism brought to the discussion the concept of sustainable development of tourism. To Santos (2014, p. 70) a sustainable interpretation of tourism takes into account territorial sustainability, which is structured around seven major vertices: the economic valences; the social valences; environmental preservation; the political decision; the factors of support; organizational factors; and the symbolic expression (an image with an identity of its own).

Tourism is an important sector to national and namely to regional development. This sector can have a major contribution to reduce regional disparities and can function as an engine for regional development and as a factor of global economic expansion. Cunha (2006, p. 283-284) points some reasons for this, like the fact that tourism allows the exploitation of heritage sites and values and, alongside with the primary sector, is the activity that best can enter a process of regional development. It allows the transfer of income from one region to another so tourism can be a factor of income redistribution. It also allows the construction and implementation of infrastructure and services (needed for tourism) that will benefit the global population and allows the modernization of local production and the reduction of regional imbalances. The role that tourism plays in regional development can be seen on the following ways (Cunha, 2006, p. 284):

- Integrated Development, when tourism is the engine of development; when it is a strategic sector for development.
- Catalytic Development, when tourist activities emerge as stimulating the development of a region but, assuming a complementary role.
- Accessory Development, when tourism activities can be useful for regional development as a means of diversification of economic activity.

Hall (2000) proposes a sustainable approach of the tourist planning or, in other words, an integrated tourism development planning. This means that tourism planning must be able to articulate the physic and economic dimension of tourism, ensuring, in a long-term, the viability of the tourism industry. The author identifies that strategic long-term tourism planning has three objectives: conservation of tourism resource values; experience of visitors who interact with tourism resources; and maximizing economic, social and environmental returns for the communities' stakeholders.



3. Tourism and Spatial Planning in Portugal

In terms of spatial planning, tourism, as other economic activity, is implemented in the territory and is therefore subject to a set of plans and legal instruments that affect its development. This process finds some difficulties due not only to the number of legal figures, but also the number of actors, the levels of decision/action and the public and private interests involved. In Portugal, the spatial and urban planning policy is established by the Law 31/2014 of 30 May, which establishes the framework law of public policy of soils, of spatial planning and of urbanism, and by the DL 80/2015 of 14 May which establishes the legal regime of the territorial management instruments.

Table 1: Portuguese Territorial Management System

Scope	Instruments	Nature
National	National Program of Spatial Planning Policy Government, under the coordination of the member of the Government responsible for the area of spatial planning.	Strategic
	Sector Programs Member of the competent Government in that matter, in articulation with the member of the Government responsible for the area of spatial planning.	transports, communications, health care, environmental, water, energy, forest, agriculture, industry, commerce, culture, tourism, defence, public security, etc. Strategic
	Special Programs Member of the competent Government in that matter, in articulation with the member of the Government responsible for the area of spatial planning.	Coastal zone programs Protected area programs Reservoir of public water programs Estuary programs Archaeological parks plans Strategic and Regulatory
Regional	Regional Programs Regional Coordination and Development Commissions and Under the coordination of the member of the Government responsible for the area of spatial planning.	Strategic
Inter-municipal	Inter-municipal Programs The inter-municipal Master Plans Inter-municipal Urbanization Plans Inter-municipal Detailed Plans Of Optional elaboration Metropolitan executive committee/ inter-municipal council/ city councils.	Strategic and Regulatory
Municipal	Municipal Master Plans Urbanization plans Detailed plans Municipal council.	Regulatory

Source: Adapted from DL 80/2015

The territorial management system (TMS) is a set of instruments, mechanisms and tools as programs and plans and other legal framework that in an articulated and integrated way establishes in different levels (national, regional and municipal) the objectives, principles and responsibilities for spatial and urban planning. According to DL 80/2015 of 14 May the Portuguese TMS organizes a framework of coordinated interaction, in four

scopes: national, regional, inter-municipal and municipal. Table 1 presents TMS which composes a set of programs and plans in different scopes as mentioned above.

In parallel with this system, Portugal has produced other legal instruments which aim to improve the protection of biodiversity and nature. In 2008, the Decree-Law 142/2008 of July 24 created the Fundamental Network for Nature Conservation (RFCN) and established the legal regime for the conservation of nature and biodiversity, being applicable to all the values and natural resources present in the territory and in waters under national jurisdiction. This network came to integrate and unite some legal instruments that already existed. Table 2 presents the RFCN.

Table 2: Portuguese Fundamental Network for Nature Conservation

Fundamental Network for Nature Conservation	1-National system of classified areas (SNAC)	1-NATURA 2000 network	1-Special protection areas (ZPE) 2-Special areas of conservation (ZEC)
		2-National Network of Protected Areas (RNAP)	1-National park 2-Natural park 3-Natural reserve 4-Protected landscape 5-Natural monument
	2-Areas of continuity	1-National Ecological Reserve (REN)	Areas of ecological value
		2-National Agricultural Reserve (RAN)	Areas of agricultural value
		3-The Public Water Domain	1-Special Plans : coastal, estuary and public water reservoirs 2- Water resources plans: National Water Plan (PNA); River Basin Management Plans (PGBH) and Specific Water Management Plans (PEGA) 3-Measures for the protection and improvement of water resources

Source: Adapted from DL 142/2008

All these instruments compose the legal framework that plays a decisive role in the preparation of Portuguese land-use plans and imposes restrictions in agricultural areas and in ecosystems considered essential to the ecological balance, helping to protect natural and cultural values.

Tourism is included in a first level in the sectoral policy instruments (table 1) with territorial impact and expression and, therefore, in connection with the other territorial management instruments. Thus, in the regional plans, municipal plans and in the special plans must be identified the location and distribution of the activities and touristic spaces and legal restrictions related to the use of natural resources, land-use among others affect touristic activities. In any case, the number and diversity of plans and legal framework with influence on touristic activity has not always been positive, sometimes ending in a complex normative of difficult coordination and articulation between sectoral and territorial scope.

4. Main major strategies for tourism in Portugal

In Portugal tourism is an important sector for the economy and therefore, it is possible to find in the last years some strategies for the development of the tourism sector. Table 3 presents the major strategies for tourism in Portugal on the last years.



Table 3: Main major strategies for tourism in Portugal on last years

PENT	2007
PENT (1st revision)	2011
PENT (2nd revision)	2013
Tourism 2020 - Plan of Action for the Development of Tourism in Portugal 2014-2020	2015
Tourism 2020 - 5 Principles for an Ambition	2015
Tourism Strategy 2027	2017

4.1. PENT

In the last two decades, and precisely from 2006 to 2015, the National Strategic Tourism Plan (PENT) was the great reference and strategic orientation for the development of the tourism sector in Portugal and defined the necessary actions for the its sustained growth. The first version of PENT was approved by Resolution of the Council of Ministers no. 53/2007, of April 4, and was developed for the 2006-2015 time horizon (Turismo de Portugal, 2013, p. 4).

PENT (Turismo de Portugal, 2007, p. 8) presented the lines of strategic development, which was structured in the following 5 axes: Territory, Destinations and Products; Brands and Markets; Qualification of Resources; Distribution and Marketing; Innovation and Knowledge; and its implementation required 11 projects, at various levels and encompassing multiple entities.

The main objective was: sustained growth above the European average, with a particular focus on revenue; translated into the following goal: annual growth in the number of international tourists above 5% and revenues above 9% (Turismo de Portugal, 2007, p. 47). The objectives were then defined regionally for the 7 Portuguese regions (Algarve, Lisbon, Madeira, Porto and Norte, Centro, Azores, Alentejo).

The strategy was based on the combination of (Turismo de Portugal, 2007, p. 45):

- The differentiating elements, constitute tourism resources that distinguish Portugal from other competing destinations – climate and light; history, culture and tradition; hospitality; concentrated diversity;
- The qualifying elements, are necessary to qualify Portugal in the range of options of the tourists – modern authenticity, security and excellence in the relation quality/price.

Taking into account Portuguese „raw materials“ – climatic conditions, natural and cultural resources – 10 strategic tourism products were defined for development and consolidation: Sun and Sea, Cultural and Landscape Tourism, City Break, Business Tourism, Nature Tourism, Tourism Nautical (includes Cruises), Health and Wellness, Golf, Integrated Resorts and Residential Tourism, and Gastronomy and Wine (Turismo de Portugal, 2007, p. 63). For each region were associated a set of products that would contribute to its performance in the short/medium term, defined according to the resources and distinctive factors of each region. The strategic product/destination matrix is presented on figure 1 and shows the contribution of products to each region.

Figure 1: Strategic product/destination matrix



Source: Turismo de Portugal (2007, p. 75)

PENT was the subject of two revisions in 2011 and 2013. Last review (Resolution of the Council of Ministers 24/2013 of 16.4.) was due to the need to be adapted to the strategic changes of the XIX government, due to the instability in the financial markets and moderate economic growth of the main tourist emitting economies of Portugal and also because the reality has shown that the definition of the objectives was not realistic because the results were far below the expectations (Turismo de Portugal, 2013, p. 4). The 2013-2015 strategy continued to build on the 10 products defined in the PENT in order to reinforce the importance of supply stability in the external perception of destiny (Turismo de Portugal, 2013, p. 14). To achieve the objectives, 8 development programs were defined and 40 projects were implemented (Turismo de Portugal, 2013, p. 48).

4.2. Tourism 2020

In 2015 *Turismo de Portugal* launched two strategic documents based on the 2020 time horizon: Tourism 2020 - Plan of Action, aimed at identifying priorities for the use of community funds for the 2014-2020 programming period, and Tourism 2020 - 5 Principles for an Ambition. Therefore, PENT was replaced by the Tourism 2020 Plan that defined the guiding principles of tourism public policies for 2016-2020. This plan is distinguished from the previous one by aiming at an ambition based on the private sector of tourism, defining an ambition of competitiveness for Portugal and five principles that favour its concretization: the Person, Liberty, Openness, Knowledge and Collaboration (Turismo de Portugal, 2015, p. 4). Its objectives were to create conditions so that the revenues earned by the private tourism sector grow in Portugal above the average of competitors and to be one of the ten most competitive destinations in the world (Turismo de Portugal, 2015, p. 4). The plan expressed this ambition in six different ways (Turismo de Portugal, 2015, p. 7-8):

- 1- A sustainable and quality destination;
- 2- A destination of competitive companies;
- 3- An entrepreneurial destination;
- 4- A destiny linked to the World;

- 5- A destination managed effectively;
- 6- A destination that marks.

Another difference in this plan is the fact that it does not want to define strategic tourism products, now focusing on the motivations and experiences to the detriment of the products, as can be seen in the following figure.

Figure 2: Motivations vs Products Matrix

MOTIVAÇÕES	PRODUTOS TURÍSTICOS	SOL E PRAIA	TOURING CULTURAL	CITY BREAKS	NEGÓCIOS	GOLFE	NATUREZA	TURISMO DO MAR	TURISMO RESIDENCIAL	SAÚDE E BEM-ESTAR	GASTRONOMIA E VINHOS
CULTURA											
CULTURA E RELIGIÃO			X	X							X
CONHECIMENTO			X	X	X						X
COSTUMES LOCAIS			X	X			X				X
PRAZER											
CONVÍVIO		X	X	X	X	X		X			X
AVENTURA							X	X			X
DIVERSÃO		X		X				X			X
QUEBRAR A ROTINA		X	X	X	X	X	X	X	X	X	X
RELAXAMENTO											
BEM-ESTAR		X				X	X			X	X
FAMÍLIA		X	X	X			X	X	X		X
DESCANSO		X							X	X	X
DEFRUTAR O CLIMA		X					X		X		X
FÍSICO											
CONTACTO COM A NATUREZA		X	X			X	X	X			X
DESPORTO		X				X	X	X			X
VIDA ATIVA		X				X	X	X			X

Source: Turismo de Portugal (2015, p. 59)

Tourism 2020 – Plan of Action consisted the strategic benchmark that establishes the objectives and the investment priorities in the area of tourism framed in the Portugal 2020, the European investment funds program of Portugal (Turismo de Portugal, 2015a). It provides a strategic frame of reference for the development of tourism by establishing its vision in a set of 5 strategic objectives (Turismo de Portugal, 2015a):

- To attract – Qualification and valorisation of the territory and its distinctive touristic resources;
- To compete – Reinforcement of the competitiveness and internationalization of tourism companies;
- To train - Training and, R&D and innovation in tourism;
- To communicate – Promotion and commercialization of the tourist offer of the country and the regions;
- To cooperate – Strengthening international cooperation.

4.3. Tourism Strategy 2027

The Tourism Strategy 2027 (ET27), approved by Resolution of Council of Ministers no. 134/2017 of September 27, is the strategic reference for Tourism in Portugal in the next decade.

The construction of the Strategy for Tourism 2027 was based on a participatory process, broad and creative, in which the State assumes its responsibility and mobilizes the various agents and society. It establishes a long-term vision, combined with action in the short term, allowing stakeholders to act with greater strategic sense in the present and to frame the future community support framework 2021-2027.

The ET27 is a long-term shared strategy for Tourism in Portugal that aims at the following objectives (Turismo de Portugal, 2017, p. 10):

- To provide a 10-year strategic framework for national tourism;
- To ensure stability and commitment on strategic options for national tourism;
- To promote integration of sectoral policies;
- To generate a continuous articulation between the various agents of Tourism;
- To act with strategic sense in the present and in the short/medium term.

The implementation and materialization of the ET27 goes through the implementation of projects, based on the lines of action of its 5 strategic axes (Turismo de Portugal, 2017, p. 50):

- To value the territory and the communities;
- To boost the economy;
- To enhance knowledge;
- To generate networks and connectivity;
- To project Portugal;

And it is committed to goals of economic, social and environmental sustainability.

This is a strategy focused on 10 assets that aim at the sustainability and competitiveness of the Portugal destination distributed in 4 categories of strategic assets (Turismo de Portugal, 2017, p. 46). Table 4 presents the 10 strategic assets that aim the sustainability and competitiveness of the destination.

Table 4: Strategic Assets

A - Unique/Transversal Asset		
The main asset of tourism, its human resources, all the people that intervene in the different activities.		
1. People		
B - Differentiating Assets	C - Qualifying Assets	D - Emerging Assets
Anchor attributes that constitute the basis and substance of the national tourism offer, having one or more of the following characteristics: -Endogenous, which reflect intrinsic and distinctive characteristics of the destination/territory, with international tourist recognition and/or high development potential in the future; -Non-tradable, that are part of a specific destination/territory, not transferable to another location and not imitable; -Flow generators, that stimulate demand.	Assets that enrich the tourism experience and/or add value to the offer of the territories, leveraged by the differentiating assets of the destination.	Assets that are beginning to be recognized internationally and which present a high potential for growth, which in the future may generate high added value movements and boost the multiplier effect of tourism in the economy.
2. Climate and Light 3. History, Culture and Identity 4. Sea 5. Nature 6. Water	7. Gastronomy and Wines 8. Artistic-Cultural, Sports and Business Events	9. Wellness 10. Living in Portugal

Source: Turismo de Portugal (2017, p. 46)

5. Main results and challenges for tourism in Portugal

After a decade of major strategies for tourism, it is important to show the current situation. Data on the following indicators are presented below. According to data from the World Travel & Tourism Council (WTTC) for Portugal, tourism accounted for 10,2% of the investment made in 2017 and 8,5% of the existing employment is in tourist activity, a figure that rises to more than 20,4% if indirect and induced effects are also accounted for. (WTTC, 2018).

Tourism in Portugal ended 2018 with indicators growing. There were 24,8 million guests registered, a growth of 3,8% over 2017, of which, 15,0 million foreign guests.

With a total of 66,1 million overnight stays in 2018 (46,5 million overnight stays abroad and 19,6 million overnight stays by nationals), the main emitting markets for Portugal were:

- United Kingdom (9,1 millions)
- Germany (6,2 millions)
- Spain (4,8 millions)

The increases were also reflected in revenues, with a growth of 9,6%, corresponding to 16,6 billion euros. In this indicator, the main issuing markets for Portugal were:

- United Kingdom (2,8 billion €)
- France (2,7 billion €)
- Spain (2,2 billion €)

In 2018, the tourism sector generated 328,5 thousand jobs (a weight 6,7% in the national economy), representing an increase of 5,3 thousand jobs compared to the year 2017.

The tourism sector is the largest economic activity in the country, accounting for 51,5% of exports of services and 18,6% of total exports in 2018, with tourism revenues accounting for 8,2% of Portuguese GDP.

According to the European Travel Commission (2019), 2019 kicked-off on a positive note for the European tourism sector following the solid performance in 2018. Portugal broke arrival records (+6%) in absolute terms early in the year and benefitted from increasing year-on-year tourism revenues, but the number of overnights fell. The recovery of Turkey, alongside the strong performances of Greece and Cyprus, may have contributed to these numbers.

Table 5: Evolution of the main indicators

	2006	2010	2014	2018
Arrivals	11 282 000	6 832 000	9 277 000	21 400 000
Receipts	8 377 000 000 €	10 077 000 000 €	13 808 000 000 €	16 614 000 000 €
Guests	12 376 941	13 537 040	17 301 622	24 800 000
Overnights	46 038 957	45 863 005	55 912 865	66 100 000
Jobs	---	287 000	276 400	328 500
% GDP	---	9,2%	11,9%	13,7%

Source: UNWTO (2007, 2011, 2015), WTTC (2018), Pordata (2019)

Table 5 (above), shows the evolution of the main indicators commonly used. These figures confirm that, although there was a period of recession that started after the 2007 international crises, which reflects on the numbers for 2010, tourism has been able to power the Portuguese economy forward. Even during the International Monetary Fund, the European Central Bank and the European Union (commonly called the „troika”)

intervention, between 2011 and 2014, most of these indicators recovered, having continued to grow after the „clean exit” of the troika.

Results demonstrated the capacity of Portuguese tourism to generate more revenue, more employment and to extend more and more the activity throughout the year and the territory and, therefore that tourism has the capacity to be a sustainable activity throughout the year.

Turismo de Portugal (2017, p. 30) stands out the positive factors of a decade (2005-2015) of tourism strategies and the aspects to improve in the future (table 6).

Table 6: A decade in analysis – synthesis

Positive factors	Aspects to improve
Territory and touristic resources more qualified	Capitalization of companies
Development support infrastructures	Human Resources Qualification
Growth in various indicators of tourist demand	Income of workers in tourism
Offer of more qualified accommodation	Bureaucracy and context costs
New forms of accommodation and touristic animation	Digitization of tourism supply
Growing creative entrepreneurship	Seasonality
Increase in the offer of touristic animation activities	Regional Asymmetries
Acknowledgments and international awards in several areas of Portuguese tourism	Information about Portugal in foreign markets
Increase of air links	Networking and joint promotion and co-creation
	Sustainability of destination and business

Source: Turismo de Portugal (2017, p. 30)

Analysing the decade, it was possible to see that the several projects implemented on the sequence of the national strategies had positive effects to develop the touristic supply and infrastructures as accommodations.

There are many areas to improve as the human resources qualifications, competitiveness of companies, bureaucracy, regional asymmetries, among other aspects that consist on challenges for the future. Thus, Turismo de Portugal (2017, p. 38) presents the 10 challenges for a 10-year strategy (table 7).

Table 7: 10 challenges for a 10-year strategy

1. PEOPLE Promoting employment, qualifying and valuing people and to increase the income of tourism professionals.
2. COHESION Extend tourism to the whole territory and promote tourism as a factor of social cohesion.
3. GROWTH IN VALUE Rhythm of growth accelerated in revenue vs. overnight.
4. TOURISM ALL YEAR To extend the tourist activity throughout the year, so that tourism is sustainable.
5. ACCESSIBILITIES Ensure the competitiveness of accessibility to the Portugal destination and promote mobility within the territory.
6. Demand To reach the markets that best respond to the challenges of growing in value and that allow to extend the tourism to the whole year and in the whole territory.
7. INNOVATION Stimulate innovation and entrepreneurship.
8. SUSTAINABILITY Ensure the preservation and sustainable economic valuation of cultural and natural heritage and local identity as a strategic asset, as well as the compatibility of this activity with the permanence of the local community.
9. SIMPLIFICATION To simplify legislation and streamline administration.
10. INVESTMENT Ensure financial resources and to promote investment.

Source: Turismo de Portugal (2017, p. 38)



6. Conclusion

This paper analyses the strategic instruments that guide the development of tourism in Portugal. Strategic planning in tourism is crucial because it can be a tool for the development of the regions and guarantees, in the long term, the sustained development of the touristic destination. It allows the maximization of income from this activity and, minimizing its negative effects.

In terms of spatial planning, tourism is subject to a quantity of plans and legal framework that affect its development which implies a diversity of actors, decision-making powers, private and public interests that is not always easy to reconcile and to coordinate. According to Machado (2010, p. 58) the institutional history of the Portuguese tourist development reveals difficulties in the cross between sectorial tourism policy and territorial planning and urbanism, leading to the insufficiency and ineffectiveness of political options of touristic spatial planning. In 2014 the report of the evaluation of the National Program of Spatial Planning Policy (PNPOT) concluded that although the program has the merit of involving for the first time the various sectors of the administration responsible for public policies with territorial incidence, however, it was difficult to articulate the sectoral policies with the various territorial programs and plans (DGT, 2014, p.16).

In Portugal has long been perceived the importance that this sector has in the economy so a set of strategies for its development have been developed. This paper presented the main strategic references for the sector analyzing its objectives and ways of implementation. PENT proved to be the first major strategy for the sector occupying the horizon of a decade. Despite the fact that it has been replaced by other strategies, persist on them some aspects of this plan both at the level of the objectives and at the level of the strategic products / resources/assets to be further developed.

Results on the major indicators shows that the strategies had positive effects to develop the touristic supply and infrastructures as accommodations, also merit of tourist enterprises, which has improved its qualification, competitiveness and modernization. However, there are many areas to improve as the human resources qualifications, competitiveness of companies, bureaucracy, regional asymmetries, among other aspects that consist on challenges for the future.

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