

European Agricultural Fund for Rural Development (EAFRD)



Regional Tourism Engagement Fund (RTEF) 2019-2020

Guidance Note

1. Introduction

This document provides guidance for the Regional Tourism Engagement Fund (RTEF). This is a **revenue** scheme and is supported through the Welsh Government Rural Communities – Rural Development Programme 2014-2020, funded by the European Agricultural Fund for Rural Development (EAFRD), and Welsh Government.

This round of RTEF funding will be **open for expressions of interest (EOIs) from Thursday 25 October 2018**, with a deadline for submission by **23 November**. Following EOI assessment, successful applicants will be invited to submit full applications by **1 February 2019**. It is anticipated that this will be the final call for applications and covers the funding period from April 2019 to December 2020.

2. Strategic context

The Welsh Government's Tourism Strategy – [Partnership for Growth](#) aims to grow tourism earnings in Wales by 10% or more by 2020. The achievement of the growth target will require a focused approach that targets first time visitors to Wales from the UK domestic market and priority overseas markets. There is also an emphasis in the strategy on targeting visitors from the in Wales market and on focusing investment on high quality, reputation changing products and events.

Place building is a key strand of the strategy to recognise the importance of improving the appeal of tourism destinations throughout Wales to drive tourism growth. Our major destinations, cities and hub towns will require a particularly focused approach.

The strategy also adopts a product led marketing approach. This seeks to communicate compelling reasons to visit and discover Wales by promoting existing products and packaging and developing 'best in class' product experiences in partnership with stakeholders. Visit Wales will work with the industry to help develop and present their product in a way that is more in line with market needs and to create platforms for businesses to promote themselves.

2.1. Purpose of RTEF fund

The purpose of the RTEF fund is to work with partners at the destination level to deliver the 10% growth target set out in the strategy by supporting activity which will:

- Meet the strategic objectives of Welsh Government's tourism strategy 'A Partnership for Growth'.
- Support destinations across Wales to promote and develop distinctive, high quality visitor destinations through the delivery of their destination management plans in order to extend the season and increase spend.
- Enable destinations to maximise the benefits from aligning with the Year of Discovery 2019, future thematic years and The Wales Way.
- Reflect all or any of the three key themes for promoting tourism to Wales of adventure, culture and landscape.

2.2 Strategic fit with the Welsh Government Rural Communities Rural Development Programme 2014-2020

The fund will contribute to the achievement of the strategic priorities outlined in the European Rural Development Plan by:

- Promoting social inclusion, poverty reduction and economic development in rural areas.
- Facilitating diversification, creation and development of small enterprises, as well as job creation.
- Fostering local development in rural areas.

3. Wales brand alignment

All projects supported will need to ensure that the product, experience and promotional material meet the following Wales brand objectives and brand values:

Brand objectives:

- Elevate our status.
- Surprise and inspire.
- Change perceptions.
- Do good things.
- Be unmistakably Wales.

Brand values:

- Authentic.
- Creative.
- Alive.

3.1 The 'Years of' marketing approach

The 'Years of' is an opportunity for tourism businesses and trade partnerships to work with Visit Wales to align their business and maximise their activity and business development by focusing on events, activities and tourism products happening over the next few years.

The Year of Adventure 2016 was the first in a series of thematic years, followed by the Year of Legends 2017 and Year of the Sea 2018 which have provided a focus for successful product development and the promotion of Wales. This funding window 2019/2020 is aimed at those proposals which can add value to previously supported Year of the Sea and looking ahead to the Year of Discovery 2019, and future thematic years; that reflect all or any of the three key themes for promoting tourism to Wales of adventure, culture and landscape and the Wales Way. Please see link for further information:

businesswales.gov.wales/tourism/thematic-years

3.2 Year of Discovery 2019

The Year of Discovery will build on the three previous themes and emphasise that Wales is alive with products, events, routes and authentic experiences to discover all around Wales. It is a chance to celebrate all that is new, unique and distinctive about our nation and to make these relevant, appealing and engaging for others.

It's an opportunity to showcase our epic adventure, landscape and culture and how these interweave to create distinctive, memorable experiences. The year will also bring more attention to specific destinations across Wales, using The Wales Way as the platform.

Markets of the future are looking to relate to a country's story, its message and for meaningful experiences. Therefore materials, messages, products and experiences will need to focus on showcasing and providing enriching experiences that don't just tell visitors about Wales – but show how Wales makes a difference to them, so they leave having discovered something new, and special, about themselves. Please see link for further information: businesswales.gov.wales/tourism/2019-year-discovery

3.3 The Wales Way / Ffordd Cymru

The Wales Way is a family of 3 routes that was launched in 2017. It is a 10-year programme of activity which will evolve and develop offering opportunities for industry and destinations to work with the concept and gain competitive advantage from it. The Wales Way will provide a focal point for international marketing, increasing visibility of Wales in the world, but will also, of course, add to Wales' appeal and offer within competitive, core domestic markets. Please see link for further information: www.thewalesway.com

The initial three routes upon which marketing focus and product development will concentrate are:

- The North Wales Way / Ffordd y Gogledd.
- The Coastal Way / Ffordd yr Arfordir.
- The Cambrian Way / Ffordd Cambria.

Each route will seek to represent the best of Wales, from our visitor experience, to our hospitality and our tourism businesses embracing what makes Wales unique. Route promotion will encourage personal customisation and trips off the main routes (e.g. 40 minutes off the main road), always promoting the use of a variety of transport, e.g. Train/Bike/Foot/Car.

In terms of product development and promotion the core routes will act as a framework for promoting Wales' great product, existing and new. New product development can use The Wales Way as an umbrella for showcasing themed, collaborative product innovation. In other parts of the world, route promotion has acted as a catalyst for private and public sector development of a wide range of initiatives.

4. RTEF eligibility and funding programme criteria

4.1 Project alignment

Each application **needs to be** endorsed by the Destination Management Partnership (s) **where possible**.

The 2019/2020 call for funding will be more prescriptive with a focus on projects which are propose innovative marketing, engaging content, product packaging and bookability.

Project proposals will need to:

- Develop or enhance tourism activities that have been identified as priorities within individual Destination Management Plans (DMPs) and/or the tourism strategy, action plan.
- Demonstrate a demand for the activity proposed.
- Be fewer, bigger, better.
- Meet the needs of one or more of Visit Wales' target market segments.
- Provide a focus for industry around which a coherent year-long offer and beyond can be built and demonstrate the ability to have an impact in the market place over a longer period of time with achievable exit strategies.
- Explore new / innovative digital ways of presenting Wales to visitors.
- Be in line with Visit Wales' thematic 'Years of' approach for 2019 and future thematic years.
- Align with the core values of the Wales brand - Authentic, Creative & Alive as well as the following themes:
 - Wales Way (especially the food offer on the Cambrian Way).
 - Wales Coast path – building on current work.
 - Cycling and Mountain biking.
 - Stargazing.
 - Genealogy wellbeing and self-discovery.
 - Food and drink.

Applications can be received by organisations leading on collaborative proposals on behalf of partnerships delivering priorities identified in Destination Management Plans (DMPs) within one or more destinations or regions.

4.2 Expected outputs

The main outputs of the project will be the creation of new tourism products and increased awareness of Wales as a holiday destination. Other expected outputs include: (this is not an exhaustive list)

- Number of new tourism products developed
- Number of new tourism initiatives created
- Visitor numbers increased
- Number of stakeholders engaged
- Marketing reach
- Content engagement

Please note that further guidance on appropriate outputs will be included in the full application form that will be provided to successful EOI applications.

4.3 What can be funded:

This is a revenue fund only and **no capital costs** are available. There is an upper limit of **£150,000 over 2 years** of RTEF funding with a **minimum grant of £30,000** per project with a **minimum of 10% match funding**. Up to 90% funding is available for eligible project activity however, projects with increased match funding will be scored as part of the assessment criteria more favourably.

This funding period spans over two financial funding years 2019/2020 and 2020/2021 however, as this fund is supported through the Welsh Government Rural Communities – Rural Development Programme 2014-2020, funded by the European Agricultural Fund for Rural Development (EAFRD), full defrayed expenditure for approved projects will need to be completed by 31 December 2020.

The following types of activity will be considered (this is not an exhaustive list):

- Soft Product development - physical and digital interpretation, revenue specific trail development; visitor management initiatives e.g. visitor transport where a demand and gap can be identified; small scale events (excluding travel trade events).
- Marketing (Content creation and translation into international languages; destination PR; digital content; itinerary development; visitor information; product bundling/packaging); Travel trade and business events engagement aligned or complementary to Visit Wales' programmes (including trade exhibitions, events and familiarisation trips, as long as this is part of a wider travel trade/business events approach).
- Destination Business Development (business support networks; non-accredited skills training; business support toolkits etc.).
- Staff costs relating to project activity. However, costs for project coordination/management **should not** exceed 20% of total individual partner project costs, apart from third sector. Costs will need to be based on actual salary rates.

4.4 What cannot be funded:

The following cannot be considered for funding:

- Third sector and private sector lead partners that are NOT financially viable. All business/charity will need to provide a satisfactory balance sheet based on three years of financial accounts at EOI stage 1 as part of the eligibility assessment.
- Capital Costs.
- Projects that benefit a single beneficiary.
- Projects less than £30,000 total project costs and less than 10% cash match funding will not be funded.
- Projects which are not covered by state aids
<http://ec.europa.eu/competition/stateaid/legislation/legislation.html>.
- General running costs for an organisation not related to the project delivery.
- Local/regional research related projects.
- Accredited training.
- Activities which fall outside of the grant funding timescale (01 April 2019 – 31 December 2020).

Businesses and organisations involved in the co-operation must be engaged in supply chains for the agriculture, forestry, food and/or hospitality sectors.

Applicants cannot be in the fisheries or aquaculture sector (due to the need to ensure complementarity with the European Maritime and Fisheries Fund).

5. RTEF expression of interest and full application process

5.1 Application process

This is a **two year funding programme** with a total project cost of **£150,000 over 2 years**. The applicant applying for funding can discuss their proposal with the Regional Tourism Engagement Manager (contact details in Annex 2) prior to submission; they can provide advice on eligibility and guidance only.

All projects will be appraised in two stages:

- **First stage** – Following submission of the Expression of Interest form (EOI) checks will be undertaken to ensure that all eligibility criteria have been met. Only projects that meet the eligibility checks will be invited to submit a full application. Unsuccessful EOI proposals will be notified following the first stage assessments.
- **Second stage** – Those successful EOI proposals that have been invited to full application stage will be sent an application form, to be submitted by 1 February 2019. Full applications will be appraised and reviewed by an investment panel in line with the appraisal criteria in Annex 1. Successful projects that achieve a minimum pass score will be recommended for Ministerial consideration and decision.

All Expression of Interest (EOI) and Full Applications will need to be fully completed and submitted to RegionalTourism@gov.wales.

5.2 Funding stages & timelines

Process stages	Start date	Deadline date
Expressions of interest	25 October 2018	23 November 2018
EOI eligibility checks	26 November 2018	30 November 2018
Applicants informed of EOI decision	3 December 2018	7 December 2018
Full applications to be sent out	W/c 3 December 2018	1 February 2019
		Applicants will be informed following full panel assessment and internal checks.

(these dates are guidelines and may be subject to change)

All Projects must commence April 2019 onwards

5.3 Full application form – claim schedule guidance

As part of the full application process, you will need to provide a planned payment schedule for the complete funding period for your project between **April 2019 – December 2020**.

Quarterly claim periods will be a **mandatory** condition of grant for projects covering up to one financial year **2019/2020 (June, September and December 2019 and March, June, September and December 2020)** and will be set out in the offer letter. However, additional claims can be submitted at any time in addition to these set deadlines. If you require additional claim periods, please add to the table provided in the application form.

The spend and claim profile should reflect spend and activity outlined in the application form. Eligible funding period will cover the date of approval on the offer letter until **31 December 2020**.

5.4 Full application approval

- All assessed applications will be submitted to Welsh Government Ministers for consideration.
- Following Ministerial consideration, applicants will be informed of the final decision and offer letters will be issued to successful applicants.

- Offer letters will need to be signed and counter-signed with two signatories and have one copy returned to Welsh Government before project initiation.

5.5 Appeals

RTEF is a discretionary fund with no set appeals process. Unsuccessful applications at the second stage will be notified following an assessment panel decision and provided feedback on their application.

5.6 Claim, payment and monitoring

- If your application is successful, payment conditions need to be met as set out in the offer letter schedule.
- The funding will be paid on **defrayed expenditure**, evidence and completion of activity and claim form by end of **December 2020**.
- Claim schedules and profiled spend will be set out as an agreement in the offer letter. The Welsh Government reserves the right to review the award of funding if agreed funding schedules are not met.
- **'Costs Defrayed'** is the costs of goods which are discharged by payment or otherwise settled by you, this is a requirement for all, unless undertaken by Third Sector.
- Claim forms can be submitted electronically but claims will not be processed until full evidence has been submitted and is assessed.
- Once approved, payment will be made within 4 working days.
- Progress reports and evidence should be submitted with each claim.
- Full evidence of 10% match funding must also be included as part of the claim process.
- Each claim will need to include evidence of outputs.

5.7 Post completion monitoring

Delivery and achievement against agreed outputs will continue to be recorded for up to 6 months following completion of the project and will be a condition of the grant offer.

6. Funding principles and requirements

6.1 Voluntary or Third Sector – Full Cost Recovery Principle

The Third Sector Scheme is unique to Wales and is a statutory requirement of the Government of Wales Act 2006 - this means that the Welsh Government has to set out how it will promote the interest of third sector organisations. The Full Cost Recovery principle recognises the need to include all costs associated with delivering a project or service. Please see page 28 for further details on the Third Sector policy.

6.2 The Well-being of Future Generations (Wales) Act 2015

The objectives of the Act show how each public body will work to achieve the vision for Wales set out in the 'well-being goals'. The seven well-being goals show the kind of Wales we want to see. The Act makes it clear that the listed public bodies must work to achieve all

of the goals, not just one or two. Reference to and explanation as to how your project meets these goals will be important in the assessment of an application. The well being goals can be found at: <http://gov.wales/topics/people-and-communities/people/future-generations-act>

6.3 Data Protection Privacy Statement

The information provided in the expression of interest application and full applications is subject to the Privacy Notice. The [Privacy Notice](#) explains the Welsh Government's processing and use of your personal data and your rights under the General Data Protection Regulation (GDPR).

6.4 EU Procurement - RDP Public Procurement

Competitive Tendering and Public Procurement - Technical Guidance Notes

1. Public sector bodies that are covered by the EC Procurement Directives are required to follow their own organisational procurement rules and procedures. The basic rules are outlined below.
2. The EC Procurement Directives apply to contracts that are financed or part financed by EU Funds. The full procurement rules apply to all public bodies and commercial enterprises in the private sector who receive grant support of 50% or more of total project costs exclusive of VAT.
3. Within the coverage of the Directives set out below, contracts above certain limits are required to be advertised in the Official Journal of the European Union (OJEU). Bids for contracts must be assessed on an objective basis and contract awards should be published in the OJEU for the amount of time relevant to the procurement procedure followed. **The grant may be reclaimed in full or in part if it is found subsequently that the procurement rules have not been observed.**

Estimated Value*	Requirement	Action
£0 - £4,999	One written quote	It is recommended to use suppliers that are registered on www.sell2wales.gov.wales
£5,000 – £24,999	Three written quotes	It is recommended to use suppliers that are registered on www.sell2wales.gov.wales
£25,000 - £106,046 (Goods and Services)	Full and open competition	Requirements may be published through www.sell2wales.gov.wales Quotes may be sought by direct reference to suppliers
£25,000 - £4,104,393 (Works)	Full and open competition	Requirements may be published through www.sell2wales.gov.wales Quotes may be sought by direct reference to suppliers
£106,047 and above (Goods and Services)	Full and open competition	Publish requirement throughout Europe via www.sell2wales.gov.wales

£4,104,394 and above (Works)	Full and open competition	Publish requirement throughout Europe via www.sell2wales.gov.wales
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*** Please note that these figures are exclusive of VAT**

Full details on competitive tendering and [public procurement requirements](#) can be found [here](#).

The Welsh Government is obliged to publish, at least every six months, details about the beneficiary receiving Rural Development payments. The procurement evidence must be provided at the claims stage not the application stage.

Project sponsors should use the register & record in conjunction with the “Competitive Tendering and Public Procurement Technical Guidance Notes”. This document can be found on the Welsh Government website.

This document must be complete and up to date for all tendering exercises and available upon request. Failure to do so may result in your grant being reclaimed in full or in part.

6.5 Welsh Language Standards requirement – Revenue Tourism Grants

The Welsh Government has a duty to promote and facilitate the use of Welsh language in accordance with Section 78 of the Government of Wales Act 2006. In addition, the Welsh language standards legally require the Welsh Government to produce and publish a policy on awarding funding (or amend an existing policy) which requires us to consider how grant decisions could be taken or implemented (for example by imposing conditions of grant) so that it would have positive effects, or increased positive effects on:

- Opportunities for persons to use the Welsh Language.
- Treating the Welsh language no less favorably than the English language.

To meet with these requirements, the following conditions will apply in relation to the use of the Welsh language for grant funded activities. The language conditions will be consistent with the standards that Tourism and Marketing is required to comply with in relation to its own activities. Applicants should seek early advice regarding the bilingual requirements of their projects and ensure that all aspects have been costed and included in their proposals.

Product development

All educational, interactive and interpretative materials developed will be bilingual

- All apps that you publish must fully function in Welsh.

Small scale events

- Where we fund small scale visitor facing events - aspects such as signage, public announcements, invitations/posters will be bilingual.

Communication / marketing:

- Marketing material - all print marketing will be bilingual, unless targeting audiences located outside of Wales only.
- All websites funded by the grant will be bilingual, except for when the website has been published for anticipated audiences that are located outside of Wales. If applicants are funding websites that are targeting audiences outside of Wales in English only, applicants will need to demonstrate that their intended audience is located outside of Wales (e.g. from google analytics). Any usage from in Wales audiences is discounted for monitoring purposes. If it transpires that there is usage from in Wales audiences then this will subject to revision. All websites that are targeting audiences located outside of Wales should state this clearly on their home page.
- There is scope to develop tailored Welsh language websites which are aimed at in Wales audiences to meet the information needs of Welsh speakers.
- Social media will be in English and Welsh unless it is used for anticipated audiences that are located outside Wales - again applicants will need to evidence that their social media is not targeted at in Wales audiences, if provided in English only.

The Welsh Government has produced the document 'Guidance on the use of the Welsh Language in Welsh Government communication and marketing work'. The guidance covers communication work delivered in Wales only and is the Welsh Government's interpretation of the Welsh Language Standards in an attempt to provide clarity and detail on all communication activity across a range of communication channels.

Please note the standards do not apply to training provision for those over 16 years.

6.6 Publicity Requirements

Press Releases and publicity about project activity

Publicity, including formal and informal announcements; brochures, pamphlets, leaflets and all other printed material; job recruitment advertisements; press and journal articles and press releases, media interviews (television and radio) and official launches and openings. All successful projects must adhere to the following publicity requirements:

- Acknowledge the support on all publicity, press releases and marketing material produced as being from the Welsh Government Rural Communities Rural Development Programme 2014 -2020, which is funded by the European Agricultural Fund for Rural Development, and Welsh Government. Such acknowledgement must be approved by Welsh Government beforehand and must comply with the branding guidelines, which will be sent out in the award of funding offer letter.
- Be aware that in accordance with EC Regulations, basic details about approved projects will be displayed on the Welsh Government website and may choose to publicise approved projects via other channels e.g. Press releases, advertorials, brochures, events etc. Details will include the name of the beneficiary, project name and the amount of EAFRD grant allocation.
- Individual branding requirements will be set out in the award of funding offer. [See further guidance](#)

Annex 1

Evaluation Criteria

Applications will first be assessed against the following eligibility criteria. Projects that do not meet the eligibility criteria will be automatically rejected and will not proceed to the appraisal stage.

Eligibility Criteria	<ul style="list-style-type: none"> • Type of external body. • Must be delivered within the appropriate timescale by 31 December 2020 final claim. • Each bid must have identified a lead organisation and be a collaborative proposal on behalf of the destination partnership (i.e. not a sole beneficiary). • Third sector and private sector lead partners must be a financially viable business/charity with a satisfactory balance sheet based on three years of financial accounts. • Minimum of 10% match funding committed. • Identified as strategic priority for call for funding.
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Appraisal Criteria

	Appraisal Criteria (RTEF)	Weighting	Score
1	Strategic Fit (Question 4) <ul style="list-style-type: none"> • Fit with the RTEF objectives • Identified priority within the delivery of the DM plan • In line with Visit Wales product-led thematic year approach (i.e. Years of) and The Wales Way • Fit with the needs of Visit Wales' market segments 	x 10	/5
2	Project quality (Question 3, 16) <ul style="list-style-type: none"> • Overall quality of application and description of proposal • Benefit and impact e.g. does it deliver measurable benefits for tourism businesses in the destination • Innovation • Environmental considerations • Well Being and Future Generations Act 2015 	x 5	/5
3.	Evidence of Need (Question 5) <ul style="list-style-type: none"> • Reasons for undertaking the activity (e.g. is it a priority in your DM Plan) • References to the activity stated in the Destination Management Plan • DMP endorsement and Wider Sector Engagement 	x 10	/5
4.	Risks, Project Implementation and Delivery (Question 6, 8, 9, 12) Quality of information provided for: <ul style="list-style-type: none"> • Project plan and team • Risk assessment for project, funding and for WG 	x 10	/5

	<ul style="list-style-type: none"> • Management Team Structure • Project collaboration and agreements 		
5.	Project deliverables (Question 7) <ul style="list-style-type: none"> • Quality of project targets • Outputs & deliverables, used to measure the success of the project • Detailed information on how these will be measured 	x 5	/5
6.	Project Costs & Value for Money (Question 10, 11, 13, 14, 15) <ul style="list-style-type: none"> • Overall proposal represents value for money • Activity and associated costs represent realistic and best value quotes • Project costs, claim schedule and information • Expected benefits are proportionate with costs • Match funding commitment at 10% or more • Staff costs are competitive and do not exceed 20% for management • Good evidence provided for exit strategy and long term sustainability of proposal • Ability to have an impact in the market place over a longer period of time • Evidence of previous evaluation (if applicable) • Additionally 	x 10	/5

Each criterion will be scored out of 5. Half marks can be given.

The scores indicate the following with respect to the criterion under examination:

- 0 *The proposal fails to address the criterion under examination or cannot be judged due to missing or incomplete information*
- 1 *Very poor. The criterion is addressed in a cursory and unsatisfactory manner*
- 2 *Poor. There are serious inherent weaknesses in relation to the criterion in question*
- 3 *Fair. While the proposal broadly addresses the criterion, there are significant weaknesses that would need correcting*
- 4 *Good. The proposal addresses the criterion well, although certain improvements are possible*
- 5 *Excellent. The proposal successfully addresses all relevant aspects of the criterion in question. Any shortcomings are minor*

Annex 2

Regional Tourism Engagement Managers

Name	Location	Email Address	Telephone No
Andrew Forfar	North	AndrewWallace.Forfar@gov.wales	03000625837
Ceri Turner	North	Ceri.Turner2@gov.wales	03000625338
Helen Jones	Mid	Helen.Jones28@gov.wales	07792610869
Jane Donald	South West	Jane.Donald@gov.wales	03000253086
Philip Abraham	South West	Philip.Abraham@gov.wales	03007904528
Louisa Giles	South East	Louisa.Giles@gov.wales	03000250152