INTERNATIONAL ANALYSIS REPORT

LINKERS INSIGHTS · JULY 2026

# Global Gastronomy Outlook

*Gastronomy as a State Strategy*

How countries are using gastronomy to strengthen their competitiveness, increase their international influence and drive economic development.

INTERNATIONAL ANALYSIS REPORT · JULY 2026

LINKERS · CONSULTANCY & TRAINING IN HOSPITALITY BUSINESS

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# Letter from the Editor

# 01 Letter from the Editor

We are living in a decisive moment for global gastronomy.

For decades, talking about gastronomy meant talking about tradition, culture, heritage or tourism. It was an element capable of enriching a visitor's experience, preserving the identity of a territory or projecting the talent of its chefs. Its value was undeniable, but it rarely occupied a relevant place in a country's economic policies.

That reality is changing.

In recent years we have witnessed a silent transformation which, nevertheless, is already having a profound impact on tourism, hospitality, the food industry and the economic development of many countries.

More and more governments are incorporating gastronomy into their national growth strategies. It is no longer just about promoting a traditional cuisine or supporting a specific economic sector.

Gastronomy has begun to play a much broader role: strengthening the nation brand, increasing the value of tourism, boosting agri-food exports, generating employment, energising territories, attracting investment and projecting an international image based on authenticity, quality and innovation.

This evolution represents one of the most interesting changes taking place in international tourism. Because gastronomy possesses a characteristic that very few strategic assets can offer: it connects sectors that have traditionally worked independently.

> *It links the farmer with the chef. The producer with the exporter. The university with the company. Tourism with culture. Innovation with tradition. And, above all, it connects a country's identity with its capacity to generate economic development.*

Over the past few years, at Linkers we have had the opportunity to collaborate with companies, public institutions and international organisations on projects related to the transformation of the gastronomic sector. That experience has allowed us to observe a trend that repeats itself, with different nuances, in very diverse regions of the world.

The questions governments ask today are no longer the same as a decade ago. They used to ask how to attract more tourists. Today they ask how to attract higher-value tourism. They used to ask how to organise a major gastronomic congress. Today they ask how to turn gastronomy into a public policy capable of transforming a country.

That change of focus is the origin of this report. Linkers Insights is born with the ambition of becoming a periodic publication dedicated to analysing the major trends transforming hospitality, gastronomy, tourism and food from a strategic perspective.

It does not intend to be an academic document. Nor a compilation of news. Our objective is to offer a rigorous, practical and global vision that helps public officials, companies, institutions and professionals understand where the sector is heading and which factors will shape its competitiveness over the next decade.

This first report addresses a question which, in our opinion, will define a large part of the tourism and gastronomy policies of the coming years. Gastronomy no longer represents merely a cultural expression. It is no longer merely a tourist attraction. It is consolidating itself as a genuine instrument of State.

Understanding this transformation also means understanding how countries will compete in the future. Because nations will no longer seek only to be visited. They will seek to be admired. To be remembered. To be chosen. And gastronomy will be one of the most powerful instruments to achieve it.

We hope this report contributes to enriching that debate and, above all, encourages administrations, companies and professionals to reflect on the enormous potential that remains to be developed.

Welcome to Linkers Insights.

**David Basilio**
Founding Partner and Chief Operating Officer · Linkers

02

# Executive Summary

*Gastronomy enters a new era*

# 02 Executive Summary

*Gastronomy enters a new era*

Gastronomy is ceasing to be considered exclusively a cultural heritage or a tourist attraction and is becoming a strategic instrument of economic development and international positioning.

In recent years, governments in different regions of the world have begun to integrate gastronomy into their public policies as a tool capable of strengthening the nation brand, increasing the value of tourism, supporting the agri-food sector, boosting exports, attracting investment and projecting a differentiated national identity.

This evolution represents a profound change from the strategies developed in recent decades. While institutional actions previously focused mainly on promoting local products, gastronomic festivals or communication campaigns, today the most advanced administrations are building genuine ecosystems where tourism, restaurants, agriculture, education, innovation and foreign trade work under a shared vision.

This report analyses this transformation, identifies the factors driving it and outlines the main trends that will shape the future of national gastronomic strategies.

## The five major conclusions

1. **Gastronomy has ceased to be a tourism asset and has become a strategic asset.** Its impact is no longer limited to improving the visitor experience. Well structured, a gastronomic strategy can increase tourism spending, strengthen a country's international reputation, generate new opportunities for the food industry, favour exports and energise local economies. Gastronomy is beginning to occupy its own space within national competitiveness policies.

2. **The most advanced countries work with long-term strategies.** The international cases analysed show a common pattern. The destinations with the greatest gastronomic recognition have not reached that position through one-off campaigns or isolated major events. They have developed sustained policies over years that integrate training, support for the private sector, international promotion, product quality, tourism, innovation and institutional collaboration. Building a gastronomic identity requires planning, continuity and leadership.

3. **Success depends on the ecosystem, not only on culinary talent.** Having excellent chefs or exceptional products is an important advantage, but it is insufficient. The most effective strategies are those capable of coordinating public administrations, producers, culinary schools, universities, tourism companies, professional associations, restaurateurs and promotion bodies under shared objectives. Gastronomy works as a system. And its performance depends on the balance between all its components.

4. **Gastronomic tourism generates a superior economic impact.** The traveller motivated by gastronomy shows clearly differentiated behaviour. They stay longer in the destination. Their average spending is higher. They consume local products and services. They take part in cultural activities. They visit less crowded territories. And they help distribute the wealth generated by tourism more evenly. For this reason, many countries are directing part of their tourism policies towards this segment.

5. **The next decade will be marked by competition between gastronomic identities.** Countries will no longer compete solely through infrastructure, advertising campaigns or natural resources. They will also compete to build authentic narratives capable of connecting with travellers, investors, companies and international markets. Gastronomy will be one of the most effective instruments to project those values.

## The four questions governments are asking today

The analysis shows a significant shift in the priorities of many administrations. The questions are no longer just how to attract more tourists or how to organise a major gastronomic event. The strategic questions are different:

| | |
|---|---|
| How can gastronomy be turned into an engine of economic development? | How can the destination's international competitiveness be improved? |
| How can more opportunities be generated for local producers and companies? | How can a recognisable nation brand be built through gastronomy? |

Answering these questions requires a much broader vision than simple tourism promotion. It requires integrating public policies, investment, training, innovation, internationalisation and collaboration between administrations and the private sector.

## A transformation that is only beginning

Everything indicates that the strategic importance of gastronomy will continue to grow over the next decade. The rise of experiential tourism, the search for authenticity, sustainability, the revaluation of local products and the need to diversify national economies are driving a paradigm shift that will affect both established countries and emerging destinations.

Understanding this transformation will be essential for those administrations and organisations that aspire to compete successfully in an increasingly demanding international arena.

> *"Countries will no longer compete only to attract visitors. They will compete to build an identity capable of generating trust, reputation and economic value. Gastronomy will be one of the main instruments to achieve it."*
>
> DAVID BASILIO — CHIEF OPERATING OFFICER, LINKERS

CHAPTER 1

# The Birth of Gastronomic Diplomacy

For much of the twentieth century, a country's international influence was measured mainly by its economic capacity, its political weight, its strategic alliances or its military strength. External projection was built through traditional diplomacy, trade agreements and presence in the major international forums.

However, the process of globalisation profoundly transformed that landscape. The opening of markets, the growth of international tourism, the development of information technologies and the increasing mobility of people and companies changed the way countries began to relate to one another. In a world where practically any destination can become known in a matter of seconds, having natural resources or quality infrastructure was no longer enough.

Countries began to compete for something far more complex: international perception. Trust, reputation and the ability to build a differentiated identity came to occupy an increasingly relevant place within national development strategies.

It was in that context that the concept of *soft power*, developed by Professor Joseph S. Nye Jr. at the end of the last century, gained prominence. In contrast to power based on coercion or economic capacity, soft power proposes a different idea: the possibility of exerting influence through attraction.

Culture, education, science, sport, creativity and innovation began to be understood as instruments capable of generating a positive image and strengthening a country's international position without resorting to traditional mechanisms of power.

Gastronomy has progressively joined that set of strategic assets. And it has done so because it possesses an exceptional characteristic: it is one of the few cultural expressions capable of connecting simultaneously with the economy, tourism, national identity and the personal experience of millions of people.

SECTORS CONNECTED BY GASTRONOMY

**Gastronomy**

Tourism · Agriculture · Culture · Education · Nation brand · Exports

Innovation · Employment · Rural development · Investment

While an institutional campaign can quickly be forgotten, a memorable gastronomic experience remains in the visitor's memory for years. That capacity to generate emotional bonds makes gastronomy an extraordinarily effective vehicle for building reputation.

> *Its true potential lies in the fact that it acts as an integrating element of numerous economic sectors. Behind every gastronomic experience coexist farmers, fishers, livestock breeders, food industries, distributors, culinary schools, restaurants, hotels, tourism companies, innovation centres, cultural institutions and public administrations.*

Few economic activities possess a similar capacity to generate value in such a cross-cutting way. Precisely for this reason, some governments began to ask themselves whether gastronomy could play a more relevant role within their public policies. The answer was affirmative.

Over the last fifteen years a very significant evolution can be observed in the way administrations understand gastronomy. Where promotional actions once predominated, today many countries work on long-range national strategies that seek to integrate tourism, agri-food production, training, internationalisation, sustainability and innovation under a single vision.

The difference is not merely conceptual. It represents a profound change in the way economic development is understood. Gastronomy ceases to be considered a result of a country's attractiveness and becomes one of the instruments capable of building that attractiveness.

This evolution explains why it is increasingly common for ministries of Tourism, Agriculture, Foreign Trade, Culture, Education or Economic Development to collaborate on initiatives that, just a few years ago, would have been the exclusive remit of tourism promotion bodies.

Gastronomy no longer belongs solely to the restaurant sector. It has become part of the strategic conversation of governments. Not because cooking is more important today than twenty years ago, but because the world has changed the way it competes.

In a global arena where differentiation is one of the main economic assets, identity acquires extraordinary value. And few expressions represent the identity of a territory better than its gastronomy.

This transformation marks the birth of a new era. An era in which gastronomy ceases to play a secondary role within public policies and becomes an instrument of international influence, economic development and nation-brand building. Understanding this change is essential to interpret the strategies that many governments are already developing and to anticipate the direction that many others will probably follow over the next decade.

> *"The real innovation is not that gastronomy has become more relevant. The innovation is that governments have begun to understand that gastronomy can be used as a public policy capable of generating economic development, strengthening a country's international position and building competitive advantages that are difficult to replicate."*
>
> DAVID BASILIO — CHIEF OPERATING OFFICER, LINKERS

CHAPTER 2

# From Tourism Promotion to State Strategy

The evolution of gastronomy as a development tool has not happened spontaneously. Nor is it a passing fashion. It is the result of a profound change in the way governments understand the competitiveness of their countries.

For many years, gastronomy played a clearly secondary role within public policies. In most cases, its presence was limited to tourism promotion campaigns, gastronomic festivals, communication actions or occasional support for certain local products. These initiatives were positive and helped improve the visibility of a destination. However, they rarely brought about structural change in the competitiveness of the gastronomic sector or the country's international positioning.

Over time, some administrations began to understand that the true value of gastronomy did not lie solely in its capacity to attract visitors. Its greatest potential lay in its ability to connect economic sectors that had historically evolved independently: agriculture, fishing, livestock farming, the food industry, tourism, restaurants, training, innovation, foreign trade and culture.

When these sectors work in isolation, gastronomy generates value, but in a limited way. When they act under a shared strategy, their capacity for economic transformation increases exponentially.

That is the most important change taking place in many countries. Gastronomy ceases to be a department. It even ceases to be a sectoral policy. It begins to become a cross-cutting policy, capable of coordinating public bodies, private companies, universities, producers, professional associations and tourist destinations around common objectives.

It is no longer just about attracting more visitors, but about generating greater economic impact per visitor. It is no longer just about supporting restaurants, but about strengthening the entire value chain that makes the gastronomic experience possible. It is no longer just about organising a major international congress, but about ensuring that congress forms part of a much broader strategy capable of leaving a lasting legacy on the territory.

This difference explains why some countries manage to consolidate their gastronomic positioning over decades while others continue to depend on isolated actions whose impact disappears shortly after they end.

## The Linkers Model of National Gastronomic Maturity

Based on the analysis of different international strategies, at Linkers we propose a model to understand how the integration of gastronomy into public policies evolves. Far from being a linear process, countries progressively advance from a cultural vision of gastronomy towards a fully strategic one, along a path of five maturity levels.

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| **Gastronomic heritage** | **Tourism promotion** | **Sector development** | **Gastronomic governance** | **State strategy** |
| Products, recipes and techniques of each territory. | Campaigns, fairs and festivals to attract visitors. | Training, quality, innovation and certifications. | Tourism, agriculture, education and foreign trade coordinated. | An asset within the national competitiveness model. |

The first level corresponds to gastronomic heritage: products, recipes, techniques and knowledge passed down through generations — the raw material on which any strategy is later built. The second appears when that heritage begins to be used as a tourism promotion tool.

In a third stage, attention turns to the development of the sector itself: investment in training, professionalisation, quality, innovation and the competitiveness of companies and professionals. The fourth level represents a qualitative leap: gastronomy coordinates different areas of public administration under shared objectives. A genuine gastronomic governance emerges.

Finally, the fifth level corresponds to the State strategy. Gastronomy becomes part of the country's development model, integrated within national policies on competitiveness, investment attraction, internationalisation, sustainability, innovation and nation-brand building. At this point it ceases to be a promotional tool. It becomes a strategic asset.

The difference between a country at the second level and one that has reached the fifth does not lie solely in the quality of its cuisine. It lies, above all, in the capacity to transform that cuisine into a competitive advantage capable of generating economic growth, international reputation and opportunities for society as a whole.

That is probably the great change that will mark the evolution of international gastronomy over the coming decades.

> *"The difference between promoting gastronomy and turning it into a State strategy lies not in the number of campaigns carried out, but in the capacity to integrate institutions, companies and society under a shared long-term vision."*
>
> MARIANELA OLIVARES — CHIEF EXECUTIVE OFFICER, LINKERS

CHAPTER 3

# The Countries That Understood the Strategic Value of Gastronomy First

The use of gastronomy as a tool for economic development does not follow a single model. Each country has built its own strategy according to its history, its culture, its economic structure and its political priorities.

Some have chosen to strengthen their nation brand through haute cuisine. Others have focused their efforts on promoting agri-food products, while some have used gastronomy as a driving force for tourism or as part of broader processes of economic transformation.

However, despite the diversity of approaches, the analysis of international cases reveals a common pattern. The countries that have managed to consolidate an internationally recognised gastronomic identity have not done so because they cooked better than the rest. They achieved it because they understood earlier that gastronomy had to stop being a sum of individual initiatives and become a collective strategy.

The difference lies not only in the chefs. It lies in the vision.

MAP OF CASES ANALYSED

● Peru ● Spain ● Denmark ● South Korea ● Japan ● Saudi Arabia

● Established case ● Emerging case

## Peru: when gastronomy becomes a national project

Few examples illustrate this transformation better than Peru. Just three decades ago, Peruvian cuisine was practically unknown outside Latin America. Today it ranks among the most recognised gastronomic references in the world and constitutes one of the country's main international assets.

This change cannot be explained solely by the talent of chefs such as Gastón Acurio or by the prestige achieved by certain restaurants. That would be too simple an explanation.

Peru's true success lies in having managed to get public administrations, producers, private companies, culinary schools, media and chefs to share a common vision. Gastronomy went from being an economic sector to becoming a national project.

The country's agricultural wealth, its biodiversity, the recovery of native products, the professionalisation of the sector, international promotion and pride in the culinary identity began to move in the same direction. The result was a transformation that transcended the restaurant industry.

Peruvian cuisine became a tool to strengthen the nation brand, boost agri-food exports, attract higher value-added tourism and improve the country's international perception.

The main lesson Peru offers is clear: a gastronomic strategy is not built around a successful restaurant, but around an ecosystem capable of multiplying that success.

PE

## Peru

*When gastronomy becomes a national project*

ESTABLISHED CASE

**STRATEGIC OBJECTIVE**

To turn gastronomy into a national project capable of generating nation brand, exports and tourism.

**INSTITUTIONS INVOLVED**

Public administrations, producers, private companies, culinary schools, media and chefs, structured around a common vision.

**MAIN ACTIONS**

Recovery of native products and agricultural biodiversity; professionalisation of the sector; international promotion coordinated between the public and private spheres.

**RESULTS**

Peruvian cuisine went from being practically unknown outside Latin America to becoming, in three decades, one of the most recognised gastronomic references in the world.

**LESSONS FOR OTHER COUNTRIES**

A gastronomic strategy is not built around a successful restaurant, but around an ecosystem capable of multiplying that success.

## South Korea: integrating gastronomy into a global cultural strategy

South Korea represents a different approach. The international expansion of Korean gastronomy cannot be understood in isolation. It forms part of a much broader strategy of cultural projection developed over recent decades.

The so-called *Hallyu* or "Korean wave" has turned music, film, series, fashion, cosmetics and gastronomy into complementary elements of a single international narrative. Each of these sectors reinforces the others.

Whoever discovers Korea through a television series ends up taking an interest in its cuisine. Whoever tastes its gastronomy develops curiosity about its products, its culture or its tourist destinations.

This capacity to connect different industries is one of the greatest strengths of the Korean model. Gastronomy is not promoted as an independent element. It forms part of a coherent national identity.

The following profile summarises the key elements of this case.

KR

### South Korea

*Integrating gastronomy into a global cultural strategy*

**ESTABLISHED CASE**

**STRATEGIC OBJECTIVE**
To integrate gastronomy into a global cultural strategy of international projection.

**INSTITUTIONS INVOLVED**
National cultural strategy (*Hallyu*) connecting music, film, series, fashion, cosmetics and gastronomy in a single narrative.

**MAIN ACTIONS**
Cross-promotion between cultural industries and gastronomy, rather than promoting it as an isolated element.

**RESULTS**
Gastronomy forms part of a coherent national identity; cultural interest generates curiosity about Korean cuisine, and vice versa.

**LESSONS FOR OTHER COUNTRIES**
Gastronomy gains strength when connected with other cultural industries, rather than being promoted in isolation.

## Denmark: turning culinary excellence into international reputation

The Danish case shows that even countries with a small domestic market can achieve enormous international projection when a strategic vision exists.

The emergence of the New Nordic Cuisine movement was much more than a gastronomic revolution. It represented a new way of interpreting concepts such as sustainability, proximity, seasonality, innovation and territory.

Denmark knew how to turn that philosophy into an international narrative. Gastronomy stopped speaking only about restaurants. It began to convey a particular way of understanding design, the environment, quality of life and innovation.

Cuisine thus became a natural extension of the image the country wanted to project to the world.

The following profile summarises the key elements of this case.

DK

### Denmark

*Turning culinary excellence into international reputation*

**ESTABLISHED CASE**

**STRATEGIC OBJECTIVE**
To turn culinary excellence into international reputation, even from a small domestic market.

**INSTITUTIONS INVOLVED**
The New Nordic Cuisine movement and its network of avant-garde restaurants and chefs, with strong momentum from the private sphere.

**MAIN ACTIONS**
Development of a gastronomic narrative based on sustainability, proximity, seasonality, innovation and territory.

**RESULTS**

Cuisine stopped speaking only about restaurants and began to convey a way of understanding design, the environment and quality of life: an extension of the country image.

**LESSONS FOR OTHER COUNTRIES**

With strategic vision, even a small country can achieve enormous international projection through gastronomy.

## Japan: protecting heritage to strengthen the future

The international recognition of Japanese gastronomy is not due solely to the excellence of its chefs either. Japan understood very early that preserving its culinary heritage meant protecting an essential part of its national identity.

The inscription of *washoku* as Intangible Cultural Heritage of Humanity by UNESCO reinforced that strategy and consolidated gastronomy as one of the country's main elements of international projection.

Tradition and innovation ceased to be understood as opposing concepts. The protection of gastronomic heritage came to coexist with an extraordinary capacity for technological, business and tourism innovation.

The result is an international image where quality, precision, respect for the product and excellence form part of the same narrative.

The following profile summarises the key elements of this case.

**JP**

### Japan

*Protecting heritage to strengthen the future*

**ESTABLISHED CASE**

**STRATEGIC OBJECTIVE**

To protect culinary heritage as an essential part of national identity and turn it into an element of international projection.

**INSTITUTIONS INVOLVED**

UNESCO (recognition of *washoku* as Intangible Cultural Heritage of Humanity), heritage conservation institutions and the tourism and technology sectors.

**MAIN ACTIONS**

Inscription of *washoku* on the UNESCO list; combination of heritage protection with technological, business and tourism innovation.

**RESULTS**

Consolidation of gastronomy as one of the country's main elements of international projection; an image uniting tradition, precision and excellence.

**LESSONS FOR OTHER COUNTRIES**

Tradition and innovation are not opposing concepts: protecting culinary heritage can drive, rather than hinder, the modernisation of the sector.

## Saudi Arabia: gastronomy as an instrument of economic transformation

Saudi Arabia is probably one of the most recent examples of this trend. Within the *Vision 2030* programme, the country has begun a profound process of economic diversification aimed at reducing its dependence on oil. In that context, tourism, culture, entertainment and gastronomy have acquired growing importance.

Investment in major international events, training, culinary heritage and the development of the gastronomic sector responds to a vision much broader than simple tourism promotion. Gastronomy is integrated into a national project of economic transformation and international opening.

Its objective is not only to attract visitors. It aims to build a new international perception of the country.

The following profile summarises the key elements of this case.

SA

### Saudi Arabia

*Gastronomy as an instrument of economic transformation*

**EMERGING CASE**

**STRATEGIC OBJECTIVE**

To use gastronomy as a lever for economic diversification and for transforming the country's international perception.

**INSTITUTIONS INVOLVED**

The *Vision 2030* programme and public bodies responsible for tourism, culture and economic diversification.

**MAIN ACTIONS**

Investment in major international events, training, culinary heritage and development of the gastronomic sector.

**RESULTS**

Gastronomy is integrated into a national project of economic transformation and international opening, beyond attracting visitors.

**LESSONS FOR OTHER COUNTRIES**

An emerging case showing how gastronomy can form part of economic diversification strategies much broader than tourism.

## What all these countries have in common

The cultural differences between Peru, Japan, Denmark, South Korea and Saudi Arabia are enormous. So are their political systems. Their economic size. Their history. Their geography. Yet they all share the same conviction. They have understood that gastronomy generates far more value when it stops being considered a sectoral policy and becomes part of a long-term national strategy.

In all of them, gastronomy brings together public administrations, private companies, universities, producers, restaurateurs, culinary schools and promotion bodies around a common purpose.

None of them bases its success solely on culinary excellence. They all understand gastronomy as a tool for competitiveness. And that is probably the main lesson they offer to the rest of the world.

The competitive advantage does not lie solely in what a country cooks. It lies in the way it organises, protects, develops and projects the entire ecosystem that makes that cuisine possible.

## Spain: gastronomic leadership built in a largely decentralised way

Spain occupies a singular position on the international gastronomic scene. Unlike other countries that have needed to build a recognisable culinary identity from scratch, Spain starts from an extraordinary advantage: its gastronomy already enjoys consolidated global prestige.

The transformation of Spanish cuisine over recent decades turned the country into one of the great world centres of gastronomic creativity and innovation. The influence of its chefs, the international recognition of its restaurants, the quality of its agri-food production and the culinary diversity of its territories have shaped an image that is difficult to match.

This leadership is not due to a single factor. It is the result of the combination of a deeply rooted gastronomic culture, an exceptional larder, a professionalised restaurant sector, a tourism industry of enormous scale and several generations of chefs who changed the way contemporary cuisine is understood.

Spain has also known how to project internationally products that form part of its identity, such as olive oil, wine, Iberian ham, cheeses, preserves, fish and seafood, and the fruit and vegetable wealth of its different territories. That connection between product, cuisine, lifestyle and tourist destination has helped build an international perception associated with quality, diversity and the capacity for innovation.

However, the Spanish model presents a relevant difference: a large part of its gastronomic positioning has been built in a decentralised way, driven by chefs, restaurants, producers, companies, congresses, regional institutions and tourist destinations that have developed high-impact initiatives from their respective spheres.

That decentralisation has fostered extraordinary richness. Spanish gastronomy does not respond to a single narrative, but to the coexistence of very diverse territorial identities. Galicia, Asturias, the Basque Country, Catalonia, the Valencian Community, Andalusia, Madrid, Castilla y León, Castilla-La Mancha, the Canary Islands, the Balearic Islands and the rest of the territories contribute differentiated products, traditions and proposals that broaden the country's overall capacity for attraction.

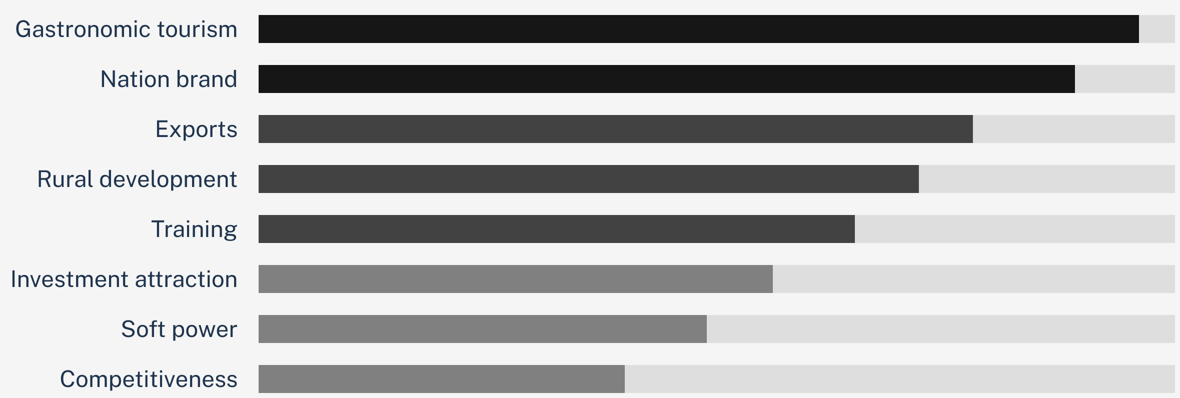
At the same time, this plurality means that the international projection of Spanish gastronomy is the result of multiple strategies that do not always respond to a common vision. Spain has an ecosystem of enormous strength, though distributed across different administrative levels, economic sectors and private actors.

Its case shows that gastronomic leadership can also emerge from talent, business initiative and the strength of the territories, without depending exclusively on a centralised national policy. But it also reflects the growing importance of connecting the different components of the ecosystem to broaden the economic, tourism and reputational impact of that recognition.

Spain does not need to build a gastronomic identity from its origin. That identity exists, is diverse and enjoys extraordinary international prestige. Its singularity lies precisely in having reached a position of leadership through a combination of heritage, product, creativity, private initiative and territorial development.

The Spanish model thus confirms one of the main theses of this report: there is no single path to turning gastronomy into a source of international influence. Each country must start from its own strengths, its institutional structure and the reality of its ecosystem. In Spain's case, those strengths already place it among the leading gastronomic powers in the world.

AREAS WHERE GASTRONOMY GENERATES THE GREATEST ECONOMIC IMPACT



> *"The countries leading international gastronomy today are not necessarily those with the best products or chefs. They are those that have known how to transform that heritage into a national strategy capable of generating reputation, competitiveness and economic growth."*
>
> DAVID BASILIO — CHIEF OPERATING OFFICER, LINKERS

CHAPTER 4

# Building a Gastronomic Ecosystem: The Strategic Decisions a Country Must Make

Recognising the value of gastronomy is not enough. Many countries possess exceptional products, cuisines with identity, talented professionals and a deeply rooted culinary tradition. Yet only some of them manage to transform that heritage into a sustainable competitive advantage.

The difference does not necessarily lie in the quality of their cuisine. It lies in the capacity to organise it.

A national gastronomic strategy is not built solely through communication campaigns, major events or the promotion of certain chefs. It requires a shared vision, institutions capable of coordinating, companies willing to invest, trained professionals and objectives that can be sustained over years.

Gastronomy works as an ecosystem. Each of its elements depends on the rest. The prestige of a restaurant is related to the quality of the product, the training of its professionals, the efficiency of distribution, the destination's capacity to attract visitors and the country's international reputation.

When those pieces evolve in isolation, the system generates partial progress. When they work under a single direction, the impact multiplies.

Building a solid gastronomic ecosystem obliges countries to make a series of strategic decisions. It is not about applying an identical formula in every territory, but about defining which model best responds to their identity, their economic structure and their development objectives.

**01** **Define what role gastronomy should play**
Nation brand, high-value tourism, agri-food exports, employment or rural development. Without a clear objective, policies fragment.

**02** **Build a recognisable identity without simplifying diversity**
Find a narrative capable of connecting multiple territorial expressions under common values.

**03** **Create governance capable of coordinating different interests**
Establish a common direction between administration and the private sector without creating new layers of bureaucracy.

**04** **Invest in people before promotion**
Training — technical, business, digital, language — produces slower but far more lasting results than notoriety.

**05** **Strengthen the productive base and protect the value of the territory**
Traceability, safety, protection of origin and market access for farmers, livestock breeders and fishers.

**06** **Measure impact and protect continuity**
Shared indicators and institutional commitments capable of surviving changes of government.

FROM THE TRADITIONAL STRATEGY TO THE STATE STRATEGY

| Traditional strategy | State strategy |
| --- | --- |
| Events | Planning |
| Fairs | Institutions |
| Promotion | Training |
| Campaigns | Product |
| Limited impact | Measurement |
| | **Sustainable impact** |

## Define what role gastronomy should play

The first decision consists of determining what is really expected of gastronomy.

Not all countries pursue the same objectives. For some, the priority will be to strengthen the nation brand. For others, to attract higher-value tourism, boost agri-food exports, diversify the economy, strengthen rural areas or generate new employment opportunities.

This initial definition is essential because it conditions all subsequent decisions. When there is no clear objective, gastronomic policies tend to fragment. Each body pushes its own actions, resources are distributed among poorly connected initiatives and measuring results becomes practically impossible.

An effective strategy must start from a concrete vision of the role gastronomy will play within the national development model. It is not enough to state that the country's cuisine should be "showcased". It is necessary to specify what economic, tourism, cultural or reputational impact is to be achieved.

## Build a recognisable identity without simplifying diversity

A country's gastronomy rarely responds to a single tradition. In most cases it is made up of very different territories, products, communities, techniques and narratives. That diversity is a strength, but it also represents a challenge from the point of view of international positioning.

Countries need to build a recognisable gastronomic identity without reducing their richness to a limited set of dishes or promotional images. A solid gastronomic brand should not simplify culinary culture, but find a narrative capable of connecting its multiple expressions under common values.

Those values may relate to biodiversity, hospitality, innovation, sustainability, tradition, territory, product or the coexistence of different cultural influences.

Identity is not built by inventing an artificial narrative. It is built by identifying what already exists, organising it and projecting it coherently. The destinations that manage to consolidate an international gastronomic image are not necessarily those with the most homogeneous cuisine, but those best able to explain the relationship between their territory, their products, their professionals and their culture.

## Create governance capable of coordinating different interests

Gastronomy cuts across areas traditionally managed by independent bodies. Tourism usually focuses on attracting visitors. Agriculture, on production and rural development. Foreign trade, on exports. Education, on training. Culture, on heritage protection. Industry, on business competitiveness.

All these areas participate in the gastronomic ecosystem, but they do not always share priorities, calendars or indicators. For this reason, one of the most important decisions is to create a governance model capable of coordinating these perspectives without generating unnecessary new layers of bureaucracy.

Institutional coordination does not mean centralising all powers. It means establishing a common direction, defining responsibilities and creating permanent mechanisms of collaboration. It also requires integrating the private sector.

Restaurants, hotels, producers, distributors, food companies, schools, professional associations and tour operators possess direct knowledge of the market and are the ones who ultimately turn public policies into economic activity.

A strategy designed exclusively from the administration runs the risk of drifting away from business reality. Likewise, a strategy based solely on private initiatives may lack continuity, territorial reach or coordination capacity. Effectiveness appears when both spheres share objectives and responsibilities.

## Invest in people before promotion

International visibility can grow quickly. The sector's capacity to respond to that visibility needs much more time.

A country can attract attention through a campaign, a major event or the success of certain restaurants. However, if it does not have prepared professionals, competitive companies and solid training structures, that recognition will hardly translate into sustainable development.

Training is one of the most important and, frequently, one of the least visible elements of a gastronomic strategy. It is not limited to teaching culinary techniques. It includes business management, team leadership, languages, customer service, digitalisation, food safety, sustainability, marketing, innovation and product knowledge.

Professionalisation must reach the entire value chain. A competitive gastronomic ecosystem needs cooks and front-of-house staff, but also managers, trainers, producers, inspectors, tourism specialists, communication officers and professionals capable of leading complex projects.

Investment in talent produces slower results than a promotion campaign, but it also generates much deeper and longer-lasting effects. Countries aspiring to build a solid position must accept that gastronomic leadership cannot be bought through notoriety. It is developed through capabilities.

## Strengthen the productive base and protect the value of the territory

Gastronomy loses authenticity when it becomes disconnected from the system that produces its food. For this reason, any national strategy must pay attention to the farmers, livestock breeders, fishers, artisans and industries that sustain the country's culinary identity.

Product quality does not depend solely on its organoleptic characteristics. It also depends on traceability, safety, regularity of supply, processing capacity, protection of origin and access to markets.

Many countries possess extraordinary products that barely generate economic value because they lack commercial structures, certifications, recognisable brands or efficient distribution systems.

The challenge is to prevent gastronomy from using the territory as mere scenery. The territory must share in the value that gastronomy generates.

When prestigious restaurants, tourism and international promotion also strengthen the local producer, the system acquires legitimacy and staying power. When recognition is concentrated exclusively in the spaces of consumption, the strategy risks widening inequalities within the value chain itself.

## Connect promotion, sector development and internationalisation

Promotion remains necessary. The mistake is to use it as a substitute for strategy.

An international campaign can increase awareness of a cuisine, but its impact will be limited if there is no prepared offer, no business network capable of meeting demand and no internationalisation policy that facilitates the arrival of products and concepts in other markets.

The external projection of gastronomy can occur through multiple channels. Tourism is one of them, but not the only one. The international expansion of restaurants, product exports, participation in fairs, the presence of chefs in global forums, cultural cooperation, international training and the capacity to attract specialised events also play a role.

These instruments work best when they form part of a single strategy. Gastronomy must be projected as a coherent experience. The visitor who discovers a product in the destination should be able to find it later in their own country. The consumer who discovers a cuisine through an international restaurant should associate it with a territory, a culture and a specific tourism offer.

That connection between consumption, reputation, exports and tourism is one of the greatest sources of value of the gastronomic ecosystem.

## Measure impact and protect continuity

Gastronomic strategies tend to generate results dispersed across numerous sectors. Part of the impact appears in tourism spending. Another, in exports. Another, in employment, business creation, international reputation, training or territorial development.

This dispersion makes measurement difficult, but no less necessary. Without clear indicators, it is impossible to distinguish between notoriety and real impact.

Measurement must begin before policies are implemented, establishing a baseline that later allows their evolution to be analysed. It must also combine economic variables with qualitative indicators. Not all the value of a strategy is immediately reflected in turnover. Improvements in international reputation, business confidence or the capacity to attract talent may require longer periods to translate into quantifiable results.

Continuity is the other great challenge. Building a solid gastronomic identity takes years. For this reason, strategies should not depend on a single event, a budget period or a political change.

They need institutions, commitments and evaluation systems that allow their direction to be maintained over the long term, introducing adjustments without constantly altering their central objectives. A strategy that starts over every few years never becomes a State policy.

## From dispersed assets to a competitive advantage

Culinary heritage is the starting point, but it does not guarantee the result.

A country can possess an exceptional cuisine and fail to turn it into economic development. It can also have more limited resources and yet build a relevant international position through a coherent strategy. The difference appears in the capacity to connect identity, talent, product, companies, institutions and markets.

Building a gastronomic ecosystem does not mean homogenising it or subjecting it to a single direction. It means creating the conditions for its different components to advance with greater coordination, share objectives and multiply the value they produce.

Gastronomy reaches its maximum capacity for transformation when it stops being a collection of valuable assets and starts working as a system.

That step, from dispersed wealth to shared strategy, is what turns a recognised cuisine into a genuine national competitive advantage.

> *"Great cuisines inspire. Great ecosystems transform countries. The true competitive advantage lies not only in talent, but in the capacity to organise, develop and project it with a shared vision."*
>
> MARIANELA OLIVARES — CHIEF EXECUTIVE OFFICER, LINKERS

CHAPTER 5

# When Gastronomy Fails to Transform a Country

The growing interest of governments in gastronomy has driven, in recent years, the launch of numerous programmes, events and promotional initiatives. Never before had so many countries incorporated cuisine into their tourism, economic development or international projection strategies.

However, the results obtained are very different. While some destinations have managed to consolidate a recognised gastronomic identity and turn it into a genuine engine of growth, others continue to develop high-quality actions whose impact disappears a few months after they end.

The difference rarely depends on the budget. Nor on the talent of their chefs. Not even on the quality of their products. In most cases it responds to a much deeper issue: the absence of a strategy capable of connecting all initiatives under a single direction.

International experience shows that gastronomic policies fail most often when they are conceived as a succession of independent actions rather than forming part of a project of transformation.

The organisation of an international congress can generate significant media impact. A culinary championship can attract visitors and temporarily position a destination. A communication campaign can raise the profile of certain products.

All these initiatives have enormous value. The problem appears when they become an end in themselves. The real question administrations should ask is not how many events they organise, but what legacy those events leave once they are over.

| | |
|---|---|
| Has the training of professionals improved? | Has the agri-food value chain been strengthened? |
| Have opportunities for local companies increased? | Has the competitiveness of the restaurant sector improved? |

Have new markets opened up for national products?

If the answer to these questions is negative, the impact of the initiative was probably far smaller than expected.

Another factor limiting the effectiveness of many strategies is institutional fragmentation. Gastronomy usually depends simultaneously on bodies linked to tourism, agriculture, culture, foreign trade, education or economic development. Each develops programmes with legitimate objectives, though not always coordinated with one another.

The result is the coexistence of excellent projects that advance in parallel, but rarely multiply their impact through joint planning. The absence of stable coordination mechanisms reduces the capacity to exploit synergies and hinders the construction of a common narrative towards the outside world.

Added to this is a frequent tendency to measure success exclusively through activity indicators. Number of attendees. Number of events. Media impacts. Views. Participants.

These indicators are useful for evaluating the execution of a specific action, but they are insufficient to determine whether the strategy is generating structural change. The truly relevant questions are different.

Has the economic value generated by gastronomy increased?

Has tourism spending risen?

Has the competitiveness of companies improved?

Have agri-food exports been strengthened?

Has a more solid international image of the country been consolidated?

Answering these questions requires a much broader evaluation and a necessarily longer time horizon.

There is also a common element in practically all the success stories analysed: the gastronomic strategies that manage to transform a country survive political change. Their continuity does not depend on a specific government or an annual budget. They become policies shared by institutions, companies, universities, producers and civil society.

That stability generates trust. It allows investment with a long-term vision. It facilitates cooperation between very different actors. And, above all, it prevents each institutional change from meaning starting over.

Gastronomy needs time. Building an international reputation takes years. Training professionals takes years. Changing the perception of a country takes years. For this reason, strategies that aspire to produce profound transformations must be able to look beyond the short term.

Ultimately, the true success of a gastronomic policy is not measured by the impact obtained at its launch. It is measured by its capacity to keep generating opportunities many years after it began.

> *"Gastronomy does not transform a country through the sum of its events, but through the coherence of its strategy. Success does not depend on doing more actions, but on ensuring that they all respond to the same purpose and generate a legacy that endures long after they end."*
>
> MARIANELA OLIVARES — CHIEF EXECUTIVE OFFICER, LINKERS

CHAPTER 6

# What Is Not Measured Cannot Become a State Policy

All strategies share the same need: to demonstrate that they generate results. Gastronomy is no exception. However, one of the main challenges administrations face is precisely the difficulty of evaluating the true economic and social impact of their gastronomic policies.

Unlike other sectors, whose results can be measured through relatively direct indicators, gastronomy produces effects that are distributed across multiple areas of activity. Its influence reaches tourism, agriculture, the food industry, restaurants, training, innovation, culture, foreign trade and territorial development. This cross-cutting nature makes its evaluation an especially complex task.

For many years, gastronomic initiatives were valued mainly for their capacity to generate notoriety. Success was associated with the number of visitors to a festival, the media impact of a congress, attendance at a fair or the reach of a communication campaign.

These indicators remain useful for analysing the execution of specific actions. However, they are clearly insufficient when the objective is to transform gastronomy into a long-range public policy.

The real question is not how many people attended an event. The real question is whether that event contributed to strengthening the country's gastronomic ecosystem. The difference seems subtle. In reality, it completely changes the way public policies are designed.

A mature gastronomic strategy stops evaluating only the activity carried out and begins to measure the value generated. Success stops being measured by what the administration does and starts being measured by what it manages to change. That shift in focus requires broadening the view.

> *The growth of tourism spending associated with gastronomy, the improved international positioning of national products, the increase in agri-food exports, the evolution of skilled employment, the creation of new companies and the attraction of investment represent indicators far closer to the true impact of a national strategy.*

EIGHT IMPACT INDICATORS OF A GASTRONOMIC STRATEGY

| | | | |
|---|---|---|---|
| 1 Tourism | 2 Exports | 3 Employment | 4 Reputation |
| 5 Training | 6 Investment | 7 Rural development | 8 Competitiveness |

A CYCLICAL EVALUATION PROCESS

Diagnosis → Identity → Strategic plan → Implementation → Measurement → Continuous improvement

*A cyclical process: continuous improvement feeds back into diagnosis*

But even these data offer only part of the picture. International reputation is one of the most valuable assets and, at the same time, one of the most difficult to quantify. The perception a country conveys conditions decisions about travel, consumption, investment and business collaboration.

Building that reputation takes years. Losing it can happen in very little time.

For this reason, countries aspiring to consolidate a leadership position need to develop evaluation systems that combine economic indicators with variables related to international perception, the quality of the business ecosystem, territorial development and sustainability.

Not everything that generates value can be measured exactly. But what is never measured ends up disappearing from political priorities.

International experience shows that the most solid strategies are also those that incorporate permanent monitoring and review mechanisms. Not to justify the decisions taken. But to improve them.

Evaluation stops being understood as an administrative process and becomes a learning tool. It makes it possible to identify which policies generate the greatest impact, where new opportunities appear and which elements need to be corrected.

This approach also favours greater institutional stability. When decisions are based on objective information and shared indicators, it is easier to maintain strategies over the long term, regardless of political or administrative changes.

Gastronomy needs precisely that continuity. Its capacity to transform a country does not depend on a single action. It depends on the accumulation of sound decisions over many years. And that accumulation is only possible when there is a will to measure, learn and evolve permanently.

Evaluation systems cease to be a complementary element of the strategy. They become an essential part of the strategy itself, because only what demonstrates its capacity to generate economic development, well-being and competitiveness can aspire to consolidate itself as a genuine State policy.

> *"The most successful gastronomic strategies are not those that generate the most activity, but those that generate the most value. Measuring only what is done leads to short-term policies. Measuring what really changes makes it possible to build strategies capable of transforming a country."*
>
> DAVID BASILIO — CHIEF OPERATING OFFICER, LINKERS

CHAPTER 7

# The Next Frontier

*How gastronomy will evolve as a tool of international competitiveness*

Every profound transformation goes through two stages. The first consists of discovering the value of a resource. The second, far more complex, consists of learning to use it intelligently. Gastronomy appears to be at precisely that moment.

Over recent decades, many countries have become aware of the enormous potential their culinary heritage holds for attracting visitors, strengthening their identity and projecting a positive image abroad. That recognition has driven investment, public policies and strategies that have placed gastronomy in a far more relevant position on the economic and tourism agenda.

However, everything indicates that this stage represents only the beginning of a deeper transformation.

The next decade will probably no longer be marked by competition between national cuisines, giving way instead to competition between gastronomic ecosystems. The difference may seem subtle, but its implications are enormous.

Until now, much of the international recognition has been built around emblematic restaurants, prestigious chefs or products of extraordinary quality. These elements will continue to play an essential role, but they will no longer be enough to explain a country's gastronomic leadership.

The true differentiating factor will be the capacity to turn that recognition into an economic advantage distributed along the entire value chain: the territory where products are grown, the training centres, the companies that process food, the laboratories that carry out research and the institutions that project that identity abroad.

The countries that manage to advance in that direction will understand that gastronomy does not begin when a customer sits down at the table nor end when they leave the restaurant. The gastronomic experience will cease to be analysed as an isolated event and will come to be understood as the visible expression of a much broader economic system.

That evolution will also change the way travellers choose their destinations. For years, gastronomy worked as a complement to the tourism experience. Today it is increasingly becoming one of the main reasons to travel. But even that reality will continue to evolve.

Visitors will not only seek to eat well. They will seek to understand: the origin of the products, the story of those who produce them, the culture that explains each recipe and the landscape that gives meaning to that cuisine. In a world where it is increasingly easy to access any international cuisine without leaving one's own city, the true luxury will be authenticity. That authenticity cannot be built through advertising campaigns. It can only arise from the coherence between the territory, the product, the people and the identity of the destination.

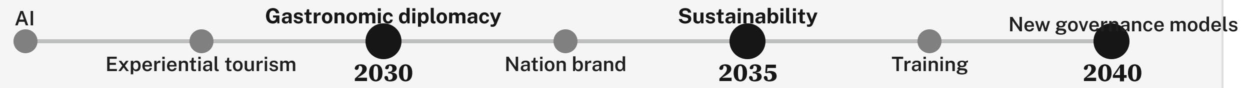
At the same time, technology will profoundly transform the way countries manage their gastronomic strategies: artificial intelligence will make it possible to analyse tourist behaviour with unprecedented precision, digitalisation will facilitate a more direct relationship between producers and consumers, and traceability will reinforce trust in the origin of products. Data will make it possible to design more effective public policies and evaluate their economic impact with greater rigour.

However, the greater the presence of technology, the more valuable those elements that cannot be automated will become: hospitality, creativity, cultural identity, the relationship with the territory, the human experience. Paradoxically, technological progress will reinforce the importance of what makes each gastronomy unique.

Gastronomic leadership will cease to be associated almost exclusively with the figure of the great chef. Competitiveness will also depend on researchers, producers, managers, teachers, sustainability specialists and professionals capable of coordinating increasingly complex projects.

Gastronomy will no longer be interpreted solely as a culinary discipline and will consolidate itself as a space of interdisciplinary knowledge. All of this will lead to a consequence of enormous relevance for public policies.

ROADMAP 2025 – 2040




The countries that obtain the best results will not necessarily be those that invest the most resources in international promotion. They will be those capable of building more solid, more coordinated systems, better prepared to adapt to a global environment in permanent transformation. Competitive advantage will no longer depend solely on what a country possesses, but on the intelligence with which it is able to organise it.

The next frontier of international gastronomy will not consist merely of cooking better. It will consist of understanding that gastronomy represents one of the economic, cultural and social infrastructures with the greatest capacity to transform a country.

And that transformation, in reality, has only just begun.

> *"The next gastronomic revolution will not be led only by great chefs or new destinations. It will be led by the countries that understand that gastronomy is an ecosystem capable of generating competitiveness, international influence and economic development in a sustainable way."*
>
> DAVID BASILIO — CHIEF OPERATING OFFICER, LINKERS

EPILOGUE

# A Historic Opportunity

Economic history shows that great transformations are rarely evident while they are happening. When the industrial revolution began, few imagined it would forever change the way we produce, trade and live. Decades later, digitalisation transformed entire industries before many organisations were fully aware of its scope. Something similar is happening today with gastronomy.

The difference is that this transformation does not revolve solely around cuisine. Its true scope lies in gastronomy's capacity to connect sectors that have evolved independently for decades. Tourism, agriculture, fishing, the food industry, training, culture, foreign trade, innovation, sustainability and territorial development are beginning to converge around the same reality.

This is no coincidence. It responds to a profound change in the way countries understand competitiveness.

For a long time, national strategies sought to differentiate themselves through infrastructure, tax incentives or international promotion campaigns. All these elements remain important, but the global arena demands something more: destinations need to build an identity capable of generating trust, attracting talent, reinforcing the reputation of their companies and adding value to their products.

Gastronomy possesses an exceptional characteristic for achieving that objective. It is, at the same time, heritage and innovation. Tradition and future. Economy and culture. Business and territory. Few tools have a comparable capacity to generate development without losing the link with a country's identity.

Precisely for this reason, gastronomy will cease to play a secondary role within public policies. Not because it will replace other development strategies, but because it will act as an element capable of integrating them.

> *The countries that understand this evolution before the rest will have a competitive advantage that is difficult to replicate. They will have managed to turn a cultural heritage into an economic strategy. A territory into a brand. A tradition into an opportunity for the future.*

Not only because they will attract more visitors. Nor because they will open more restaurants or export more products. Their advantage will be far deeper.

That transformation does not depend exclusively on governments. Nor does it correspond solely to the private sector. International experience shows that the most solid models are those where administrations, companies, producers, universities, schools, professional associations and civil society work under a shared vision.

Gastronomy then ceases to be a set of independent initiatives and becomes a collective project. That is probably the greatest lesson offered by the countries analysed in this report.

Gastronomic leadership cannot be improvised. It is built. It requires time. It requires continuity. It requires institutions capable of collaborating, companies willing to innovate and professionals committed to a vision that transcends individual success.

The next decade will offer an exceptional opportunity for those countries that decide to take that path. Not all will start from the same position. Not all will have the same resources. But all will be able to ask the same question: not what gastronomy they have, but what future they wish to build through it.

Because, in the end, gastronomy has never been solely about what happens around a table. It speaks of how a society produces, shares, preserves its identity and imagines its future. And that is precisely why it has ceased to be merely a gastronomic question and has become a genuine question of State.

AUTHORSHIP

# The Authors

# The Authors


## David Basilio

Founding Partner and Chief Operating Officer · Linkers

*Specialist in gastronomic strategy, destination development and public policies for hospitality and tourism.*


> *"Gastronomy only transforms a country when it stops being a sector and begins to become a strategy."*

David Basilio is an international consultant specialising in strategy for hospitality, gastronomy and tourism, with a career focused on designing and developing projects for companies, public administrations, international organisations and governments.

As founding partner and Chief Operating Officer of Linkers, he leads projects related to strategic planning, the development of gastronomic destinations, the transformation of the hospitality sector and the implementation of initiatives aimed at strengthening the competitiveness of gastronomy as a tool for economic development, international positioning and value creation for territories.

He is currently President of the Hospitality Area of the World Gastronomy Institute (WGI), Director General of the Bocuse d'Or Spain National Academy, member of the Economic Committee of Worldchefs (World Association of Chefs' Societies) and Director of the Entrepreneurship Area of the Ferran Adrià Chair at Camilo José Cela University, where he promotes research, outreach and knowledge-transfer projects linked to gastronomy, hospitality and tourism.

Throughout his career he has collaborated on international gastronomic and tourism development projects alongside governments, institutions and public organisations, taking part in initiatives related to strategic planning, the professionalisation of the sector, destination development, the organisation of international competitions and the design of gastronomic ecosystems.

His professional activity is complemented by a distinguished editorial and research career. He is co-editor and co-author of the Dictionary of Gastronomy of the Ibero-American Academy of Gastronomy, responsible for the definitions related to business models, and regularly contributes to publications, conferences and analysis projects on the strategic evolution of the sector.

In recognition of his contribution to the international dissemination of gastronomic knowledge, he was awarded the Gourmand Award, in the professional gastronomy category, as co-author of the report "Global Report 2020: A Gastronomic Planet".

He is co-author of Linkers Insights, an editorial initiative created to analyse the main trends redefining gastronomy, hospitality and tourism from a strategic and international perspective.

#### MAIN AREAS OF EXPERTISE

Gastronomic and tourism strategy · Gastronomic diplomacy and nation brand · Destination development · Public policies for gastronomy · Hospitality sector competitiveness · Organisation of international competitions · Research and strategic analysis

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## Marianela Olivares

Founding Partner and Chief Executive Officer · Linkers

*Specialist in leadership, talent and organisational transformation in the hospitality industry.*

> *"An organisation's competitiveness always begins with the people who make it possible."*

Marianela Olivares is an international consultant specialising in leadership, organisational strategy and talent development for the hospitality, gastronomy and tourism sectors.

As founding partner and Chief Executive Officer of Linkers, she leads consulting projects for companies, hotel chains, restaurant groups, public institutions and governments aimed at strengthening the competitiveness of organisations through leadership development, the professionalisation of talent and the transformation of their management models.

She combines this activity with her role as Director of the Talent and Leadership Area of the Ferran Adrià Chair at Camilo José Cela University and as Vice-President of the International Association of Coaching in Tourism, promoting research, outreach and knowledge-transfer projects focused on the evolution of employment, leadership and the new skills demanded by the hospitality industry.

In recent years she has led numerous processes of business reorganisation, executive development and organisational transformation, also taking part in international projects linked to the strengthening of gastronomic ecosystems, the training of professionals and the improvement of the sector's competitiveness.

Her work focuses on analysing the evolution of leadership, change management and the development of human capital as essential factors in facing the challenges of hospitality and tourism in an increasingly competitive global environment.

She is co-editor and co-author of the Dictionary of Gastronomy of the Ibero-American Academy of Gastronomy, responsible for the definitions related to the professions of the sector.

She is co-author of Linkers Insights, the publication from which she promotes the analysis of the main international trends related to talent, business organisation and the strategic evolution of gastronomy and tourism.

#### MAIN AREAS OF EXPERTISE

Leadership and organisational transformation · Talent and executive development · Business strategy in hospitality · Change management · Executive training · Research on leadership and employment in hospitality

EDITORIAL

# About Linkers Insights

# About Linkers Insights

Linkers Insights is an editorial initiative promoted by Linkers with the aim of analysing the main trends redefining gastronomy, hospitality and tourism from a strategic and international perspective.

The publication is born with the ambition of providing useful knowledge for public officials, international organisations, companies, universities and professionals taking part in the transformation of the sector.

Each edition addresses a different strategic challenge through the analysis of international experiences, emerging trends and development models applicable to different territories.

Beyond describing current affairs, Linkers Insights aims to contribute to the debate on the future of gastronomy as an engine of competitiveness, economic development and international influence.

THE FIRM

# About Linkers

# About Linkers

Linkers is an international consulting firm specialising in hospitality, gastronomy and tourism. The company develops projects for companies, public administrations, international organisations and governments, supporting the design of strategies aimed at strengthening the sector's competitiveness, driving destination development, professionalising talent and positioning gastronomy as a tool for economic growth.

Its activity integrates strategic consulting, organisational transformation, public policy development, training, research and the organisation of international initiatives, working with a vision that combines technical knowledge, operational experience and cooperation between the public and private sectors.

In recent years, Linkers has taken part in projects related to gastronomic planning, tourism, professional training, business competitiveness and the development of gastronomic ecosystems in different countries, collaborating with national and international institutions to promote long-range initiatives.

## Areas of activity

- Gastronomic and tourism strategy
- Destination development
- Public policies
- Hospitality competitiveness
- Training and talent development
- Organisation of international projects
- Research and strategic analysis

Consultancy & Training in Hospitality Business

## LINKERS INSIGHTS

*Research for Hospitality, Gastronomy & Tourism*

JULY 2026

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