

DRAFT ANNUAL TOURISM REPORTING TEMPLATE

1. INTRODUCTION

Council Decision 86/664/EEC of 22 December 1986¹ establishing a consultation and cooperation procedure in the field of tourism foresees that “each Member State shall send the Commission, once a year, a report on the most significant measures it has taken and, as far as possible, on measures it is considering taking in the provision of services for tourists which could have consequences for travellers from the other Member States”.

With the publication of the “Agenda for a sustainable and competitive European tourism”, the Commission announced that “in order to strengthen the collaboration with and among Member States, their current annual reporting through the Tourism Advisory Committee (TAC) will be used to facilitate the exchange and the dissemination of information about how their policies and actions safeguard the sustainability of tourism”.

This Communication was welcomed by the Competitiveness Council conclusions (22nd-23rd November 2007) and by the Presidency Conclusions of the Brussels European Council of 14th December 2007.

The main aims for the reporting process are:

- to be able to monitor the level of implementation of the “Agenda for a sustainable and competitive European tourism” by Member States;
- to facilitate the exchange of experiences among member States with regard to how they tackle issues which are important for the competitiveness and sustainability of European tourism.

MS reports referring to year n shall be sent to the European Commission by the end of February of year $n+1$.

If the reports are sent in English, the deadline is shifted to the end of April.

2. ORGANISATIONAL STRUCTURE

This section should provide an overview of the main organisational structure to illustrate how tourism is organised and managed, to identify linkages and to identify the engagement of other organisations/stakeholders.

The information required will only need to be prepared fully in year 1 as it will subsequently only be necessary to provide details of any changes.

¹ Official Journal L 384, 31/12/1986 P. 0052 – 0053.

ITALY TOURISM REPORT 2008

2.1 Please identify the National Bodies responsible for tourism (Ministry and also any separate/related National Tourism Organisation), including key areas of responsibility, and their relationship to other national bodies. (maximum of 1.000 characters)

The Italian Government's Authority responsible for tourism is the Presidency of the Council of Ministers - Department for Development and Competitiveness of Tourism (*Dipartimento per lo Sviluppo e la Competitività del Turismo*). The Secretary of State in charge of the tourism policy is the Hon. Michela Vittoria Brambilla.

The Department of Tourism carries out the following tasks:

- in coordination with regions and autonomous provinces, elaborates and defines the national tourism policies;
- adopts measures for the tourism sector, as well as for planning and management of structural funds;
- supervises ENIT (see below) , ACI (*Automobil Club Italia*) and CAI (*Club Alpino Italiano*)
- provides aids and incentives to develop tourism demand
- promotes investments both in Italy and abroad;
- delivers certifications and authorisations to foreign professionals;
- manages relations with international organisations and participates in the elaboration and adoption of EU legislation.

The Italian State Tourism Agency (ENIT - Ente Nazionale Italiano per il Turismo) is under the supervision of the Department for Tourism. Regions and other stakeholders are represented in the executive board. It pursues the objective of promoting Italy as a destination and its natural and cultural heritage. It also carries out studies and publications, develops marketing and promotion strategies aimed at supporting the Italian tourist sector, in coordination with local authorities and other stakeholders.

2.2 Please, describe what organisations/agencies are used to deliver services at the national and regional level and the services that they deliver. (maximum 800 characters)

1) Promuovi Italia (Italy Promotion): a "in house" agency of the ENIT. Its main task is to support Public Authorities operating in the tourism sector by promoting local economic growth through the funding of investment programs carried out by privately-owned enterprises.

2) Regions: the Constitution empowers them to play an essential role in the field of the tourism through several key activities such as :

- managing European Structural Funds;
- programming and developing tourism activities at regional and local level;
- promoting strategic marketing activities;
- performing tasks related to the regional tourism structures;
- performing tasks related to enterprises and tourism professions.

3) Provinces and Municipalities contribute in improving the quality of the tourist supply. Their national organizations are: UPI (*Unione delle Province Italiane*) and ANCI (*Associazione Nazionale dei Comuni Italiani*).

ITALY TOURISM REPORT 2008

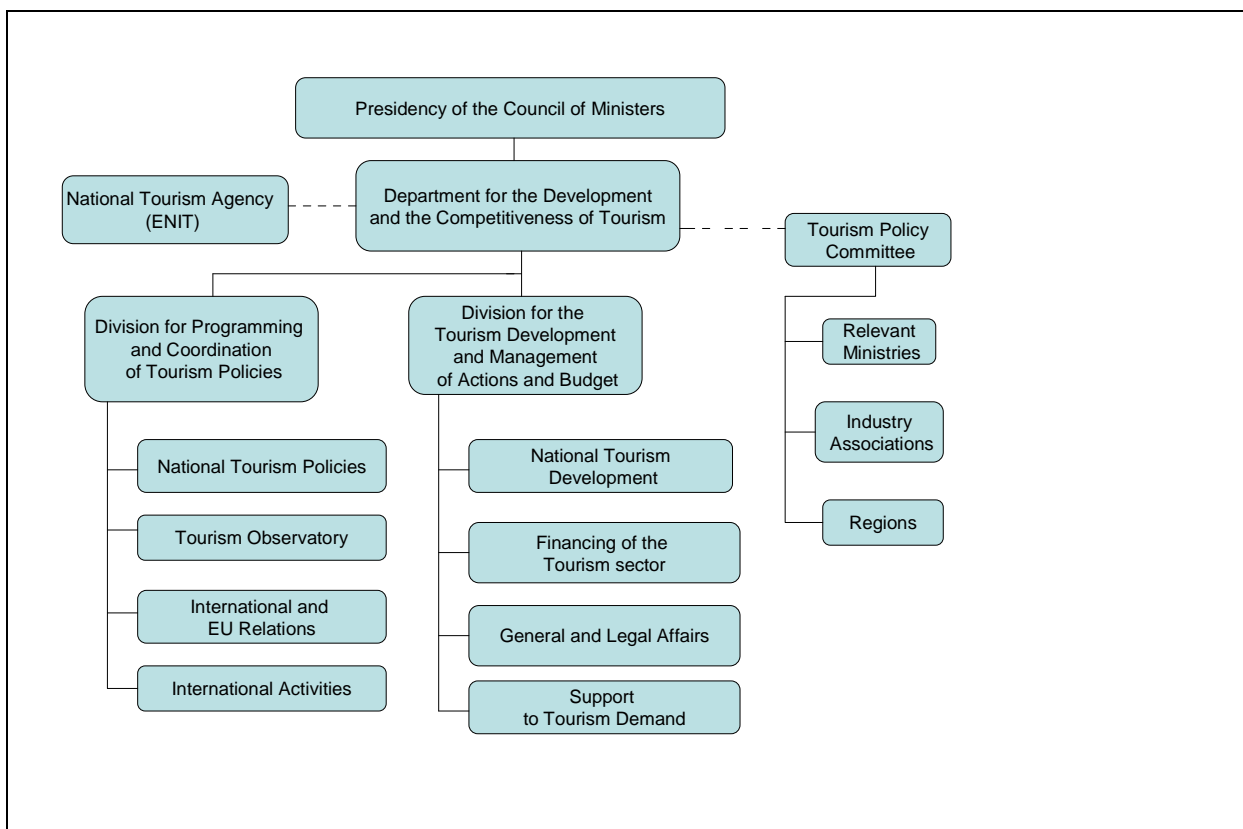
2.3 Please, describe which other bodies and organisations are involved at the national level and the process for involving them. (maximum 800 characters)

The most important Federations of Associations at national level in the field of tourism are: Federturismo (Confindustria), Confoturismo (Confcommercio) and Assoturismo (Confesercenti).

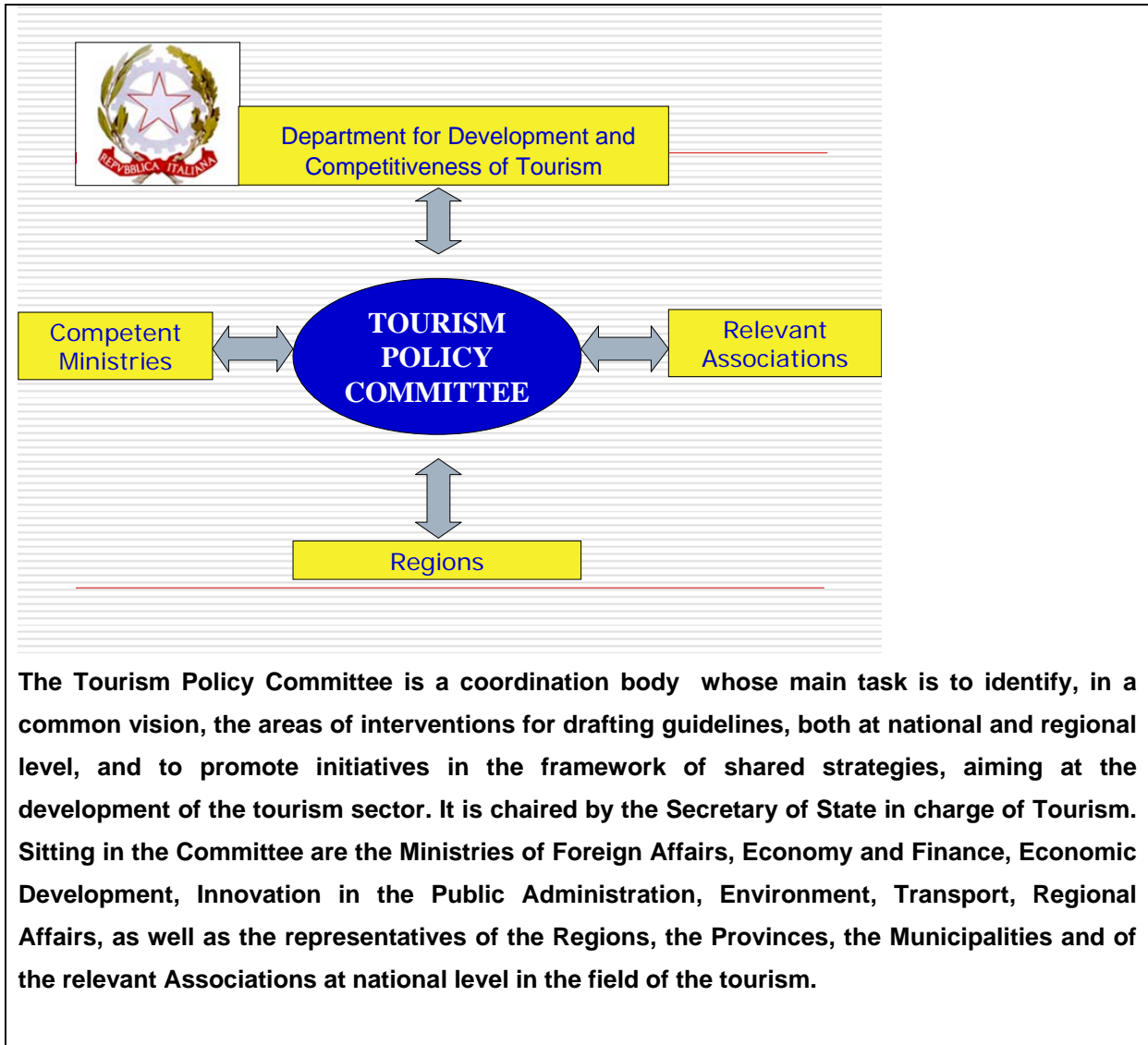
Their tasks are:

- **representation of tourism industries and professionals;**
- **information and communication on actions of common interest;**
- **training, studies and research programmes;**
- **promotion of the culture of the entrepreneurship;**
- **support of initiatives in favour of sustainable development in the tourism sector.**

2.4 Please provide a diagram/organigram of the organisational structure for tourism identifying the relationship between national, regional and local bodies. Provide also a short description of the core responsibilities and competencies of each of the organisations. Include also information regarding the direct and indirect links between other departments, stakeholder organisations and unions. Information about mechanisms of decision making process participation from outsider organisations, e.g. forums, advisory committees is also requested. (maximum of 2.000 characters)



ITALY TOURISM REPORT 2008



The Tourism Policy Committee is a coordination body whose main task is to identify, in a common vision, the areas of interventions for drafting guidelines, both at national and regional level, and to promote initiatives in the framework of shared strategies, aiming at the development of the tourism sector. It is chaired by the Secretary of State in charge of Tourism. Sitting in the Committee are the Ministries of Foreign Affairs, Economy and Finance, Economic Development, Innovation in the Public Administration, Environment, Transport, Regional Affairs, as well as the representatives of the Regions, the Provinces, the Municipalities and of the relevant Associations at national level in the field of the tourism.

2.5 Please provide information about financial data, including spend/budget on tourism as a percentage of overall government spend/budget, the level of national funding support for tourism marketing, the amount of EU funding support made available for tourism and data concerning the support to SMEs and Destinations. (500 characters)

In 2009 the budget for the National Tourism Administration was EUR 76.500.000,00, of which EUR 33.500.000,00 was earmarked for the operations of the National Tourism Organisation (ENIT).

It is to be considered that Regions are also fully responsible for the financial resources they allocate to the sector. Latest data provided by monitoring centres refer to 2006, when the 20 Italian Regions spent 1.81 billion Euro for promoting their respective territory.

ITALY TOURISM REPORT 2008

| Tourism in the national economy | | | | | | |
|---|--------------|---------------|-------------|-------------|-------------|-------------|
| | Units | 2004 | 2005 | 2006 | 2007 | 2008 |
| Tourism as % of gross domestic product | Percentage | 5,1 | 4,9 | | 4,8 | : |
| Domestic tourism as % of final consumption | Percentage | 7 | 7 | 7 | 7 | : |
| Tourism as % of employment | Percentage | 9,4 | 9,7 | | 9,7 | : |
| Employment in tourism (hotels and restaurants) * | Thousands | | | 1113 | 1140 | 1162 |
| | | 1266 | 1246 (Q3) | | | |
| Source: | | CISSET, 2009 | | | | |
| | | * ISTAT, 2009 | | | | |

3. POLICIES AND STRATEGIES

3.1 Is there a current National Strategy for tourism? Yes No

If yes, please, provide information in bullet point format about the key aims, objectives and priorities of the strategy highlighting those that are designed to address sustainability issues in economic, environmental and social terms in particular those related in the six aims included in the Agenda. In preparing the tourism strategy, explain how consideration has been given to the 9 principles set out in the Agenda (para2.3 p5) and given in the appendix. (maximum 1.000 characters)

Upon taking office, in May 2008, the Secretary of State for Tourism announced the guidelines for a “National Strategy to enhance the development of tourism in Italy”:

- **setting up a task-force to promote Italy as a destination, through a strong action of marketing and communication;**
- **enhancing the interaction between national and regional/local administrations so as to face the challenges of logistics, infrastructures, networks of services and transport;**
- **signing strategic agreements with key international tour operators;**
- **ensuring business-oriented management of major cultural and sport events;**
- **improving the level of professional training;**
- **supporting enterprises willing to include the new ICT in their development planning;**

reorganizing the National Observatory of Tourism, with the aims of enhancing the reliability of data and collecting and disseminating more timely information.

3.2 Who was the initiator and who is responsible for its implementation? (maximum 200 characters)

The Department of Tourism is responsible for the implementation of the strategy at the national and inter-regional level, while Regions are responsible at regional and local level. In order to strengthen cooperation, an “agreement for synergic promotion in the tourism sector” was signed between the central Government and Regions. A number of specific committees were put in place to develop a multi-annual strategic plan, which should be ready before next summer.

3.3 How is the strategy monitored and how often? (maximum 500 characters)

The strategy was launched in May 2008: implementation has just started.

The fully re-organised Tourism National Observatory is meant to monitor the implementation of the strategy, step by step.

3.4 What tourism specific legislation exists? (maximum 500 characters)

The most important law regulating tourism in Italy is Law n.135 of 29 March 2001, reforming the whole sector. With law n.181 of 18 May 2006, the overall responsibility at the national level was conferred to the Presidency of the Council of Ministers, while the Department of Tourism was set up through Law n. 286 of 24 November 2006.

As already mentioned, at the regional and local level, the Constitution itself (art.117) entitles Regions and autonomous Provinces with exclusive legislative powers. Therefore, each one of the 20 Italian Regions has its own laws and regulations in the field of the tourism: according to the basic principle of subsidiarity, all of them follow the principles set out both by the EU and national Italian legislation. In particular, the Government decree of 13 September 2002, adopting the agreement signed between the central State and the Regions and autonomous Provinces on the harmonization, promotion and development of the tourism sector, reaffirmed the principle that Regions should comply with commitments undertaken by the central Authority.

4. MEASURES AND INITIATIVES

This section provides Member States with an opportunity to outline specific initiatives and policies that are or are going to be adopted to manage and develop tourism activity in ways which respond to the key challenges of the Agenda and which fall within the six main aims of the Agenda itself.

1 Economic prosperity

- a. To ensure the long term competitiveness, viability and prosperity of tourism enterprises and destinations.
- b. To provide quality employment opportunities, offering fair pay and conditions for all employees and avoiding all forms of discrimination.

2 Social equity and cohesion

- a. To enhance the quality of life of local communities through tourism, and engage them in its planning and management
- b. To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, religion, disability or in other ways.

3 Environmental and cultural protection

ITALY TOURISM REPORT 2008

- a. To minimise pollution and degradation of the global and local environment and the use of scarce resources by tourism activities.
- b. To maintain and strengthen cultural richness and biodiversity and contribute to their appreciation and conservation.

4.1 Please set out, briefly, the steps which have been or will be taken, if any, to address the 7 key challenges for the delivery of sustainable and competitive tourism, covered in the TSG report and referred to in the 'Agenda'.

4.1.1 Reducing the seasonality of demand. (maximum 200 characters)

Face to the current economic downturn, the Secretary of State for tourism signed in January 2009 a decree on "holidays vouchers" to benefit low income families. Vouchers can be used from the 6th of January until the first week of July, and from the first week of September until the 20th of December. The amount granted covers between 20% and 45% of the average family expense for holidays, calculated according to several criteria, such as annual income and number of persons in the family.

4.1.2 Addressing the impact of tourism transport. (maximum 200 characters)

**Within the framework of the programme "Industry 2015" the Ministry for Economic Development has financed 22 projects on the sustainable mobility, for a total amount of 180 MEuro in incentives.
250 enterprises and 100 research centres are involved.
Some examples: "ecological steamer"(fuelled by hydrogen and photovoltaic panels), coaches with reduced carbon emissions, "flexible" trains etc.**

4.1.3 Improving the quality of tourism jobs. (maximum 200 characters)

Several initiatives are carried out every year in the framework of social policies and economic recovery plans, financed with national and EU funds. For example, the MOTUS initiative, with the specific aims of providing services of excellence for the tourism industry and training highly skilled professionals, to benefit young people from Southern Italy.

A Committee for the Enhancement of Education and Training in tourism was set up.

4.1.4 Maintaining and enhancing community prosperity and the quality of life, in the face of change. (maximum 200 characters)

Some interregional projects have been co-financed by the Department of Tourism and the Regions:

- **Hospitality in the villages (Campania, Basilicata, Puglia etc.);**
- **Mediterranean food and wine (Calabria, Sicily, Puglia),**
- **Tourism in the countryside (Lombardy, Sicily and other Regions).**

4.1.5 Minimising resource use and the production of waste. (maximum 200 characters)

Some interregional projects contribute to improve the performance of the tourist enterprises and infrastructures, and to minimise resource use and the production of waste:

- **Promotion of quality in the supply of the tourist systems (Piemonte, Liguria, Lombardy);**
- **Assessment and monitoring of the quality of hotel enterprises (Piemonte, Lombardy);**
- **Improvement of quality in the tourist supply (Abruzzo, Marche, Umbria).**

4.1.6 Conserving and giving value to natural and cultural heritage. (maximum 200 characters)

. There are also interregional projects with the specific objective to enhance natural and cultural heritage:

- **Promotion of cultural tourism (Lombardia, Emilia Romagna, Liguria, Piemonte);**
- **Tourist and cultural routes (Lazio, Emilia Romagna, Marche etc.) ;**
- **Development and upgrading of mountain destinations (Toscana, Emilia Romagna)**

4.1.7 Making holidays available to all. (maximum 200 characters)

See point 4.1.1.

4.2 As key challenges may change over time, please identify any other areas that are becoming a new challenge. (maximum 600 characters)

A new challenge could be the networking of small towns or minor destinations with similar or complementary resources, in order to promote joint tourist products in terms of quality and competitiveness.

4.3 Please identify and describe a specific initiative, which is related to the 7 key challenges, that is innovative/ successful and which would be of interest to or of help to other Member States. (maximum 2.000 characters)

The project for an “extended hotel” in Santo Stefano di Sessanio is a test-case of

entrepreneurial innovation:

This project was carried out by the “Sextanto” company in a semi-abandoned medieval borough located in the National Park of Abruzzo, to create an “extended hotel” inside the borough. Besides offering accommodation and catering, there will be workshops for traditional craftsmanship, a wine cellar with local wines and culinary products, an inn specialising in local cuisine, a conference hall, a wellness centre, and a centre for excursions. Reconversion aims to fully protect the historical and architectural heritage of Santo Stefano di Sessanio, one of the most interesting boroughs of the whole Apennine mountain range of the Abruzzo Region.

5. MECHANISMS FOR IMPLEMENTATION

Three mechanisms for implementing the Agenda were identified in the “Agenda”: sustainable destinations, sustainable businesses and responsible tourists.

5.1 Sustainable destinations: What support is given to strengthen destination management at the regional/ destination level (supportive policy environment, knowledge networks, training programmes, establishment of measures/indicators for benchmarking, etc.)? (maximum 600 characters)

See point 4.1.4 to 4.1.6

5.2 Sustainable businesses: What support is given to strengthen the sustainability and competitiveness of businesses (supportive policy environment, orientation of business support services to sustainability, training, financial incentives, etc.)? (maximum 600 characters)

See point 4.1.2

5.3 Responsible tourists: What support is given to promote responsible choices by tourists (e.g. sustainability in education, national marketing and media campaigns, promotion of certification schemes)? (maximum 600 characters)

In November 2008, the Department of Tourism launched a promotional campaign in favour of more responsible forms of tourism and against sexual exploitation of children in tourism. The initiative includes major organisations, associations and enterprises operating in this field which have undersigned the so-called “Code of certification of responsible tourism” (*Certificazione di Turismo Responsabile*).

Since November 2008, Italy hosts, in the premises of the Department of Tourism, the Permanent Secretariat of the World Committee on Ethics in Tourism, with the task of promoting and disseminating the UNWTO Global Code of Ethics in Tourism.

6. DATA AND INDICATORS

ITALY TOURISM REPORT 2008

Eurostat will provide, as an annex, the key statistical data required to support the reporting process covering around 20 indicators². These are mainly related to the aim of 'economic prosperity'.

Please, identify indicators that are being used or developed which could add to the range of information being provided by Eurostat, particularly in relation to social and environmental issues (other indicators from the TSG report, visitors/ residents satisfaction, etc.). (maximum 500 characters)

Additional indicators related to sustainability in tourism:

- number of residents vis-à-vis number of tourist arrivals;
- availability of opportunities of professional training for residents;
- level of inclusion of local population in tourist development projects;
- type and impact of land use;
- level of water and energy consumption;
- waste treatment cycle;
- development of sustainable transport.

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7. COMPLEMENTARY ADDITIONAL INFORMATION

If necessary use the following box to provide additional complementary information that has not already been covered.

Common strategies have been launched by the Department of Tourism with the Ministry for Economic Development and the Ministry of Foreign Affairs to promote Italy as a brand (marketing of "Destination Italy" packages, "Made in Italy" products) to attract foreign investments in the tourism industry.

* * *

Tourism flows of residents

| | Units | 2004 | 2005 | 2006 | 2007 | 2008 |
|------------------------|--------------|---------------|---------------|---------------|---------------|---------------|
| Overnight stays | Thousands | 98120 | 107100 | 107895 | 112369 | 122938 |
| <i>of which: Italy</i> | Percentage | 83,9 | 83,4 | 83,2 | 83,2 | 83,9 |
| abroad | Percentage | 16,1 | 16,6 | 16,8 | 16,8 | 16,1 |
| Nights spent | Thousands | 644989 | 676243 | 719763 | 689313 | 706650 |

Source:

ISTAT, 2009.

Inbound tourism: international arrivals and receipts

| | Units | 2004 | 2005 | 2006 | 2007 | 2008 |
|-----------------------------------|--------------|---------------|---------------|--------------|--------------|--------------|
| Visitors | Thousands | 59 483 | 60 220 | 67456 | 71200 | 71683 |
| <i>of which: Germany</i> | Thousands | 11 997 | 11 059 | 10835 | 11521 | 11596 |
| Switzerland | Thousands | 9 490 | 8 703 | 10293 | 11157 | 12195 |
| France | Thousands | 8 262 | 8 434 | 10328 | 9913 | 10139 |
| Austria | Thousands | 5 576 | 5 939 | 6367 | 6818 | 6611 |
| United Kingdom | Thousands | 3 822 | 4 226 | 4514 | 4808 | 4129 |
| same-day visitors <i>excluded</i> | Thousands | 37665 | 37069 | 41635 | 44150 | 43210 |

² These indicators have been selected from the 50 TSG indicators on the basis of the possibility to calculate them at the European level.

ITALY TOURISM REPORT 2008

| | | | | | | |
|-----------------------------------|----------------------|---------------|---------------|--------------|--------------|--------------|
| Tourism receipts | Million EUR | 28 665 | 28 453 | 30368 | 31121 | 31107 |
| same-day visitors <i>excluded</i> | Million EUR | 26951 | 26874 | 28681 | 29472 | 29290 |
| Source: | Bank of Italy, 2009. | | | | | |

| | | | | | | |
|--|----------------------|---------------|---------------|--------------|--------------|--------------|
| Outbound tourism: international departure and expenditure | | | | | | |
| | Units | 2004 | 2005 | 2006 | 2007 | 2008 |
| Departures | Thousands | 43335 | 46030 | 49128 | 52517 | 57359 |
| same-day visitors <i>excluded</i> | Thousands | 22041 | 23499 | 24401 | 26148 | 30721 |
| Tourism expenditure | Million EUR | 16 515 | 18 001 | 18399 | 19952 | 20848 |
| same-day visitors <i>excluded</i> | Million EUR | 15640 | 17039 | 17368 | 18907 | 19367 |
| Source: | Bank of Italy, 2009. | | | | | |

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Reaction to the ongoing economic and financial crisis affecting tourism

In October 2008, at the High Level Meeting organized by OECD in collaboration with the Italian Department of Tourism (9-10 October 2008), the Secretary of State for Tourism indicated the following criteria to cope with the international economic crisis:

- 1. Systemic planning of all tourism resources, to enhance cooperation between public bodies and private companies and improve overall competitiveness;
- 2. Better an simpler regulation, to promote development of new facilities and to upgrade areas already equipped with basic services;
- 3. Further differentiation of supply, on the basis of the goods and services that a given market segment or a local area can provide;
- 4. Upgrading of professional training, creation of new specialized courses;
- 5. Consortia of small enterprises to better articulate the provision of services in the tourism sector and improve their organisation.

ITALY TOURISM REPORT 2008

APPENDIX

Principles of sustainable tourism:

- **Taking a holistic and integrated approach**

All the various impacts of tourism should be taken into account in its planning and development. Furthermore, tourism should be well balanced and integrated with a whole range of activities that affect society and the environment.

- **Planning for the long term**

Sustainable development is about taking care of the needs of future generations as well as our own. Long term planning requires the ability to sustain actions over time.

- **Achieving an appropriate pace and rhythm of development**

The level, pace and shape of development should reflect and respect the character, resources and needs of host communities and destinations.

- **Involving all stakeholders**

A sustainable approach requires widespread and committed participation in decision making and practical implementation by all those implicated in the outcome.

- **Using best available knowledge**

Policies and actions should be informed by the latest and best knowledge available. Information on tourism trends and impacts, and skills and experience, should be shared across Europe.

- **Minimising and managing risk – the precautionary principle**

Where there is uncertainty about outcomes, there should be full evaluation and preventative action should be taken to avoid damage to the environment or society.

- **Reflecting impacts in costs – user and polluter pays**

Prices should reflect the real costs to society of consumption and production activities. This has implications not simply for pollution but for charging for the use of facilities that have significant management costs attached to them.

- **Setting and respecting limits, where appropriate**

The carrying capacity of individual sites and wider areas should be recognised, with a readiness and ability to limit, where and when appropriate, the amount of tourism development and volume of tourist flows.

- **Undertaking continuous monitoring**

Sustainability is all about understanding impacts and being alert to them all the time, so that the necessary changes and improvements can be made.