

ITALY REPORT ON TOURISM 2011

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.

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 Department for Development and Competitiveness of Tourism (*Dipartimento per lo Sviluppo e la Competitività del Turismo*) at the Prime Minister's Office, under the authority of the Minister of Tourism (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 (State Tourism Agency), ACI (*Automobile Club d' 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 of 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: 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 programmes 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*).

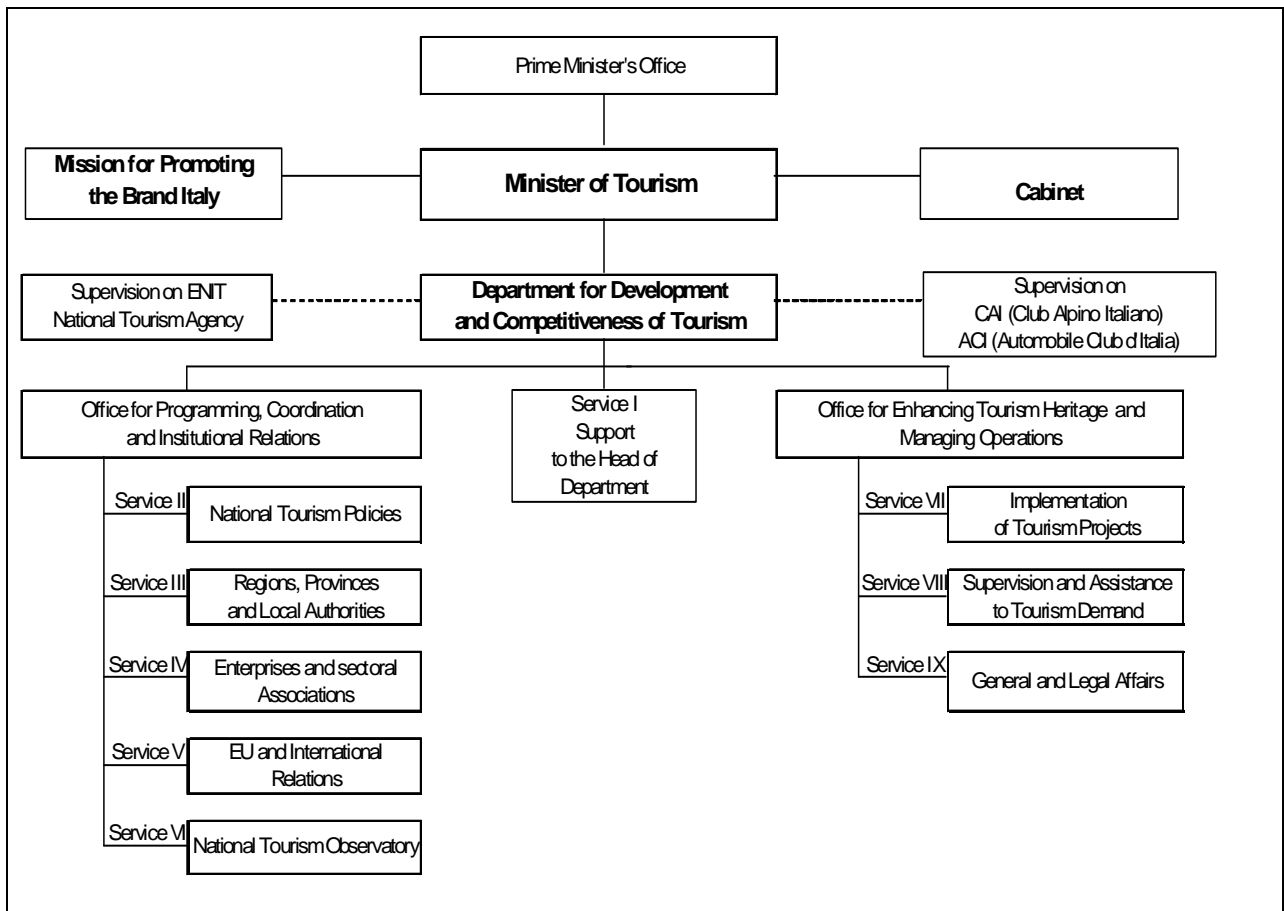
2.3 Please, describe which other bodies and organisations are involved at the national level and the process for involving them. (maximum 800 characters)

The most important Federations of Associations at national level in the field of tourism are: Federturismo (Confindustria), Confturismo (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)



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)

- Budget Forecast for 2010 for the National Tourism Administration (Department of Tourism) was 46,274,035.00 Euro of which 20,594,342.00 Euro earmarked for the operations of the NTO (ENIT).

In Italy Regions allocate to the sector financial resources of their own. Latest data refer to 2009, when the actual expenditure for tourism was globally 1,611 million Euro.

The Department of Tourism leads a Project aimed at providing the Convergence Regions (Calabria, Campania, Puglia and Sicily) with tools and methodologies supporting the design and management of development plans in the tourism sector. The budget allocated to this project, co-financed through the Governance and Technical Assistance National Operational Plans (ERDF 2007-2013) is of 4,400,000.00 Euro.

In the framework of the Inter-regional Programme on Cultural, Natural and Tourism Attractors - ERDF 2007-2013, aimed at promoting the social and economic development in the Convergence Regions through the valorization of the cultural, natural and landscape heritage , the budget allocated by the Department of Tourism is 49,907,000.74 Euro.

Furthermore, another co-financed project, carried out in the framework of the Inter-regional Programme on Cultural, Natural and Tourism Attractors (budget euro 139,200.00 Euro) came to a fruitful end with the production of studies on the tourism economy of the four Convergence Regions, including data on tourist structures and tourism flows in those regions.

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, the then Secretary of State - appointed in May 2009 as Minister of Tourism- in May 2008, specified 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 plans;**
- **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.

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

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

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

The most comprehensive framework law regulating tourism in Italy is Law n.135 of 29 March 2001. Following the Constitutional amendments, with law n.181 of 18 May 2006, the overall responsibility at the national level was conferred to the Prime Minister’s Office, where the Department of Tourism was set up through Law n. 286 of 24 November 2006.

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

- 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)

By Minister's Decree of July 2010 the use of Holidays Vouchers was modified establishing that they can be used until the first Sunday of July, if the end of June falls during the week and from the 23d of August to the 19th of December. The decree has confirmed prohibition of use from the 20th of December to the 6th of January and State contribution between 20% and 45% of the average expense for holidays. Another innovation as compared to 2010 is the annual family income calculated on the basis of a specific economic indicator (ISEE). Additional budget for 2011 is of 5 million Euro.

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 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)

The project LAVORO E SVILUPPO 4 (LES4) (*Work and Development*) was launched to continue and close the interventions carried out in the past years (Lavoro & Sviluppo Turismo, Motus, Replay and Replay – estensione) in the framework of national policies towards job creation and assistance to enterprises: the project envisages along the next three years 6000 interventions of “on the job high-education” and complimentary services, destined to disadvantaged or unemployed people from the Convergence regions. Aim of the project is to encourage matching between job supply and demand in the tourism sector, through the inclusion of highly skilled professionals into the target enterprises.

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

Some multi-annual interregional projects have been co-financed by the Department of Tourism and the Regions. For instance:

- 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 multi-annual 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)

- The Ministry of Education, University and Research, in cooperation with the Department of Tourism and the Technical Unit for the Celebration on the 150th Anniversary of Italy’s Unification has launched an initiative aimed at promoting educational travels for secondary**

school students to the sites and events organized in the framework of the celebrations for the 150th Anniversary of Italy's Unification. The initiative is particularly interesting because, besides fostering the young to get acquainted with the historical events that led to the unification of the Country, it helps the tourism sector to reduce seasonality of demand.

- Furthermore, 8 million Euro were allocated for the reinforcement of the regional and inter-regional tourism offer through the development of food and wine itineraries

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 Minister of Tourism has launched together with the ANCI, the Association of Italian Municipalities, an initiative in favour of "animal friendly" behaviours in tourism, the objective of which is to safeguard and develop the tourism offer for those who travel with their pet, while discouraging the regrettable phenomenon of animals' abandonment especially during summer holidays.

The Minister and the ANCI have agreed upon a model of municipal order allowing and regulating pets' access to public offices, establishments and means of transports, and facilitating detection of green areas and beaches reserved or open to pets.

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)

After the approval of the Global Strategy for the dissemination, communication and implementation of the UNWTO Global Code of Ethics for Tourism, the Permanent Secretariat of the UNWTO Committee on Tourism Ethics, hosted at the premises of the Department of Tourism, has pursued its activity with the distribution of the “Code” at major international and national events (BIT, Milan – FIFA World Cup, Johannesburg – World Congress on Social Tourism, Rimini - WT, London), the organization of an International conference on “Ethics and Tourism, winning the challenge” in the framework of BIT, Milan and the drafting of model protocols of implementation of the “Code’s” principles, to be proposed as examples of best practices in international fora.

6. DATA AND INDICATORS

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;**

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

- level of water and energy consumption;
- waste treatment cycle;
- development of sustainable transport.

7. COMPLEMENTARY ADDITIONAL INFORMATION

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

- **Memorandum of Understanding between Italy and France on the promotion of the "Via Francigena" signed in Brussels, September 27, 2010, for the development of a common long-term strategy for the protection and promotion of cultural routes. Opened for signature of the United Kingdom and Switzerland.**
- **Protocol between Italy, France and Spain ("European Passion "), which defines a joint program of action to promote tourist flows from China, India and Brazil, signed in Brussels, September 27, 2010.**
- **Initiative "Easy Italy" a multilingual information and assistance service to tourists, active 7 / 7, from 9.00 to 22.00, and available in Italian and in other 6 languages (English, French, Spanish, German, Chinese, Russian).**
- **Initiative "Virtual Travel Market" launched by ENIT, the Italian State Tourism Agency, the first virtual fair "business to business" for the promotion of Destination Italy on international markets.**
- **Initiative "Magic Italy in Tour", in collaboration between the Minister of Tourism and the Minister of Agricultural Policies, to promote abroad Italian destinations and products, and from November 2010 until July 2011.**
- **Election of Italy at the Chairmanship of the UNWTO Executive Council for 2011 (Kish Island, Iran, October 2010).**

TOURISM IN FIGURES

Tourism flows of residents

	Units	2006	2007	2008	2009	2010*
Number of trips	Thousands	107895	112369	122938	114099	99997
<i>of which: Italy</i>	Percentage	83,2	83,2	83,9	82,7	81,7
abroad	Percentage	16,8	16,8	16,1	17,3	18,3
Number of nights spent	Thousands	719763	689313	706650	680215	626947
Source:	ISTAT, 2011					
*provisional data						

Inbound Tourism: international arrivals and receipts

	Units	2006	2007	2008	2009	2010
Total international arrivals	Thousands	67456	71200	71701	72540	74106
Top 5 Markets						
Germany	Thousands	10835	11521	11598	11484	10914
Switzerland	Thousands	10293	11157	12199	12385	13414
France	Thousands	10328	9913	10144	10199	10076
Austria	Thousands	6367	6818	6613	7373	7699
United Kingdom	Thousands	4514	4808	4133	3628	3368
same-day visitors <i>excluded</i>	Thousands	41635	44150	43214	43609	44015

Tourism receipts	Million EUR	30368	31121	31090	28856	29170
same-day visitors <i>excluded</i>	Million EUR	28681	29472	27472	27059	27436
Source:	Bank of Italy, 2011					
 <i>Outbound Tourism: international departures and expenditure</i>						
	Units	2006	2007	2008	2009	2010
Number of tourism trips	Thousands	49128	52517	57387	57747	59779
same-day visitors <i>excluded</i>	Thousands	24401	26148	26667	27698	28444
International travel expenditure	Million EUR	18399	19952	20922	20015	20382
same-day visitors <i>excluded</i>	Million EUR	17368	18907	17886	18536	18894
Source:	Bank of Italy, 2011					
 <i>Tourism in the national economy</i>						
	Units	2006	2007	2008	2009	2010
Value added (hotels and restaurants)	Million EUR	50240	52649	54344	54392	:
<i>as percentage of total</i>		3,8	3,8	3,8	4	:
Employment (hotels and restaurants - Q4)	Thousands	1050	1099	1113	1119	1157
<i>as percentage of total</i>		4,6	4,7	4,8	4,9	5
Source:	ISTAT, 2011					

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.