

FOR THE OECD' TOURISM POLICY REVIEW OF ITALY – Statement of Francesco Adamo, University of E. Piedmont “A. Avogadro” , Director of Re-Tour , Interregional network for tourism progress (www.re-tour.it)

In many Italian regions, where the tourism is mature and costs of life and labor are high, the main development problem is to remain competitive and the main development strategy is the innovation and re-qualification of their products but, above all, of territorial development conditions (transport infrastructure, landscape and local environment, both ecological and social). Only some regions still have large potential attractions to be explored and need to organize the product and promote the growth of tourist fluxes. With regard to urban destinations, for some historic and artistic cities the main problem is to regulate and select the tourist fluxes, besides re-qualification. For most other cities and towns which were important ports and/or industrial centers and now are converting to tourism and other economic bases, main problem is to change their image and organization, to attract tourists and to improve the quality of life for residents and other conditions to attract investments. These and many other geographical differences of the tourism development issues, mean that development policies and strategies are and have to be geographically different. Nevertheless, development problems of the tourist destinations need anywhere a consistent planning policy at multi scales, from national state to region and sub-region levels. (Adamo, 2000)

Competitiveness, mainly in tourism, needs sustainability (Adamo, 2005). But development to be sustainable needs to be planned and managed carefully. This is the only way for Italian destinations to benefit from the unquestionable advantage given by culture, as well as by nature. The lack of a tourism development planning at national level and a very poor use of it at regional and sub-regional level can explain the main weaknesses of the Italian tourism policy and tourism. Italian destinations need a planning, not only “strategic” but also operational, knowledge-based, participatory and systemic. Planning policy leads to build an organizational structure, self-improving and capable to coordinate at different scale and decision level the actors of the tourist industry and its development environment, monitor the destination territory, its market and the tourism policy effects.

Collaboration is an important route to competitiveness for many activities and in tourism, as the same Italian Law 135/2001 suggests, is an essential condition of success. Tourism is not a sector, but a cluster of very different sectors (system of production) whose end result or final output is tourist experience. The activities of all the other subjects of the system serve the tourist views and experiences that, if satisfactory, will convince the tourist to return to the previous destination (as well as to the same subjects of the tourism industry) and anyway will make the same tourist to be the best marketing tool. Collaboration among firms in Italian tourism industry is particularly important, considering that most of them are very small. An absolute priority for Italian tourism progress is a national program facing some emergencies (such as VAT and other taxes reduction, application of the new national hotel classification, stop to coast concretization, improvement of transports, etc.); completing the organizational structure and planning tools; starting the implementation of the preliminary analyses for a serious audit of tourism resources; coordinating information and promotion under an Italian unique brand.

1. Organizational structure, Coordination, Financing and Governance in Tourism.

Governance is fundamental for the progress of every destination, in economic competitiveness and ecological and socio-cultural sustainability. It implies structures, at national, regional and sub-regional, able to: 1) coordinate, according the principle of subsidiarity, the different actors directly interested in tourism matters (see fig. 1); 2) govern as much as possible the processes changing the territory conditions of tourism development, both spatial (accessibility) and environmental (natural and social, material and immaterial, such as the local tourism culture); 3) promote change in tourism system and in local environment to respond to changes in external environment .

Such an organization is finally under construction at national level with the participation of National Government, Regions, other territory bodies and Firms Associations, after years of stalemate since the change of the Fifth Title of the Italian Constitution and the attribution to Regions of an “exclusive” competence in tourism, in 2001. In the last years a Tourism National Committee has been instituted, which includes representatives of the above public and private bodies and it really could ensure vertical co-ordination and improve horizontal coherence between tourism and other national policies. Moreover, a Tourism National Observatory has been created, which for the moment is carrying out the essential function of coordinating and promoting the collection of data and information, with the collaboration of various bodies working in this field and mainly ISTAT (Central Statistical Institute), the national institution competent for censuses and other surveys, and for comparable data processing and publishing. The National Observatory, possibly working as a network of regional observatories, could also have a great importance in promoting research, to be carried out by a network of existing universities and other research centers, also in agreement with an effective Italian tourism development agency, as the ENIT-National Tourism Agency could be. This is the new denomination of ENIT (Ente Nazionale Italiano per il Turismo), which has been relaunched and funded by the State but whose mandate still continues to be limited to promotion activities and practically remains an advertising agency.

Promotion , with advertising and other means , is also important for Italian tourism, but it must be supported by a requalification of the offer and particularly of the territory conditions. The Italian tourism priority is not as much to diffuse knowledge of the Italy attractions and to attract new tourists, but to convince tourists to remain longer and mainly to return again. This means both coordination among the actors of the offer, including local people who are an essential part of the tourist experience, and actions to improve the relation quality/price, which is possible mainly increasing quality but also reducing costs (reducing taxes and utilities tariffs, creating scale economies via cooperation, introducing innovations). To achieve this and boost sustainability and competitiveness of Italian destinations, an absolute priority is to start a process of real territory planning for tourism development, at national and sub-national levels, which will also include the promotion and marketing actions.

This planning process needs, at each geographical scale of decision making, an adequate organization structure, with human resources capable to carry out scientific analysis, to elaborate plan, to manage the plan and its action projects, to monitor the plan and territory and market changes, and also to evaluate tourism impacts. This structure should be a “light” Department of tourism planning and management, inside an agency depending on the National Tourism

Committee and on similar Committees at other scales. This Department shall be composed by officials qualified in all the action fields of Public Administration important for tourism and coordinated by an expert in tourism and territory development planning. It could be “light” drawing both from the experiences of Associations of Tourism Firms and other aspect of territory and the existing specialized institutions for survey and data processing (ISTAT), research and training planners and managers (universities).

Considering tourism policy as territorial policy, and particularly as continuous planning process, is the only way to favor vertical integration, to make possible horizontal coherence between tourism and other policies; to encourage monitor activities, transparency and impacts evaluation. With a participatory planning, like the one proposed, involving the whole territorial community and carried out with its full consensus, possible mistakes and flops not only would be promptly identified and corrected but certainly could not be regarded as a fault of governmental institutions. Moreover, the destination development plan increases the possibility for the firms of the tourism system to get funding and to overcome one of the most present difficulty of the small firms characterizing the Italian tourism industry.

2. Information, statistics and data on tourism

Planning and govern tourism need to be supported by a geographical information system with data to be regularly updated, provided by the National Observatory and particularly data collected and processed by ISTAT, which is the competent national body and has an important experience in surveying different aspects of the country and can guarantee a good geographical and temporal comparability. In particular, ISTAT should get the conditions to improve

With regard to the Tourism Satellite Account , just some estimates of private researchers or university research centers (CISSET) were published, but there is not a systematic and regular work of collecting data and calculation using the UN WTO and OECD model yet. Just recently, Italy is participating in a project promoted by the European Commission for the creation of the TSA in European countries. The responsibility for this work has correctly been given to ISTAT and this institution, which has already experience in input –output analysis and economic regional account, should hopefully also get the means for a systematic and regular collection of the data for this account, at national and regional level.

In the last ten years, there has been a development of research in tourism, but it is still not sufficient and, except for few research centers, generally carried out without continuity. Basic and applied research, like high level training, a typical university competence, should become continuous for tourism governance and progress. A light cost-saving model could be to fund and use the network of existing universities, stimulating research projects and contracting applied research and consultancy work for tourism planning , promotion and management.

3. Attractiveness and promotion

A priority for Italian tourism progress, as stressed above, is coordination and requalification of the offer in order to develop structures , human resources and tools of tourist destination planning. With the exception of some regions and towns, the use of planning as a tool to govern tourism and territory is poor. Some of them develop a strategic plan, but rarely an operational one, including the monitoring of consequences and territory changes. Even more rarely there is a coherent integration between tourism and other policies (infrastructure, ecology,

landscape, .finance); a challenge that needs a systemic approach and a unique planning tool. A preliminary work for this planning process, but also for a correct communication and promotion, is the inventory and the evaluation (in term of attractiveness, maintenance status, usability , managerial efficiency..) of the tourism resources with the same criteria in the whole national territory, as proposed by the university consortium Re-Tour. It is from an accurate audit of tourism market conditions and tendencies that goals, objectives and actions , both of products development and of marketing can be identified.

Concerning promotion policies performance, Italian destinations do not seem to make any evaluations and in any case no publication is available.. The problem that seems more evident is the high fragmentation and dispersion of promotion activities, even of the promotion action outside Italy that should be competence and any way coordinated by ENIT (like the international relations are competence of the Ministry of foreign affairs). Priority is the coordination more than the expansion of promotion activities.

4. Training, skills and human capital.

Small size of private firms and in general the poor number of entrepreneurs with a university degree make the employment of young people who are leaving university with a degree relevant on tourism more difficult. This may also be due to the fact that the number of students in tourism courses has been growing fast in the last ten years, together with the number of university courses and the awareness of the tourism importance, after the end of the ford-taylorist manufacturing industry. The problem is not the total number of university courses that could seem excessive, but the fact that there are several degree courses with the same title but with very different teaching contents..

This contradiction, probably due to the fast growth of these university courses, could be easily overcome, especially since the new Minister of Tourism, on. Michela V. Brambilla , has given a priority to the re-organization of all the training activities concerning tourism, university courses included. The Minister's choice aimed to improve the quality of human resources - a factor that is strategic in the present competition (see fig. 2). This is even more important in the case of training courses for tourist guide, call center receptionist, chef and for other manual labors in tourist services, where training is different in each region and even province, not in relation to different needs in terms of skills and knowledge needed, but simply the different kind of training institution and different quality of trainers selected. Re-organization and, in many case, requalification, are urgent also because a greater labor demand concern these kind of jobs.

This and other possibly contradictions could be in part overcome by a self regulation process, as shown for example by the constitution of the University Consortium Re-Tour (www.re-tour.it) which has coordination of training courses and research among its objectives. In spite of this contradiction, the interest in tourism of the Italian universities, together with the good quality of their training and research activities, is an important opportunity for the Italian tourism progress. Universities are embedded in the territorial community and are among the most important resources for progress in the present global competition, particularly for planning and managing destination. Unfortunately, given the poor awareness of the need of a tourism policy and their tools, public institutions and their agencies do not employ enough people with a university degree in tourism. Many university courses (such as those of Re-Tour network, but also Pisa, Rimini and Bocconi and IULM of Milan) have links with tourism industry and

tourism public agencies (internships, conference and lectures of managers and entrepreneurs in some teaching courses). The Italian university system can certainly be improved, but its greatest difficulties are 1) the scarcity of public funds for research and for practical training contracts with professionals of the tourism industry and territory development agencies; 2) the excess of continuous changes in their rules and organization imposed by several national government changes.

References

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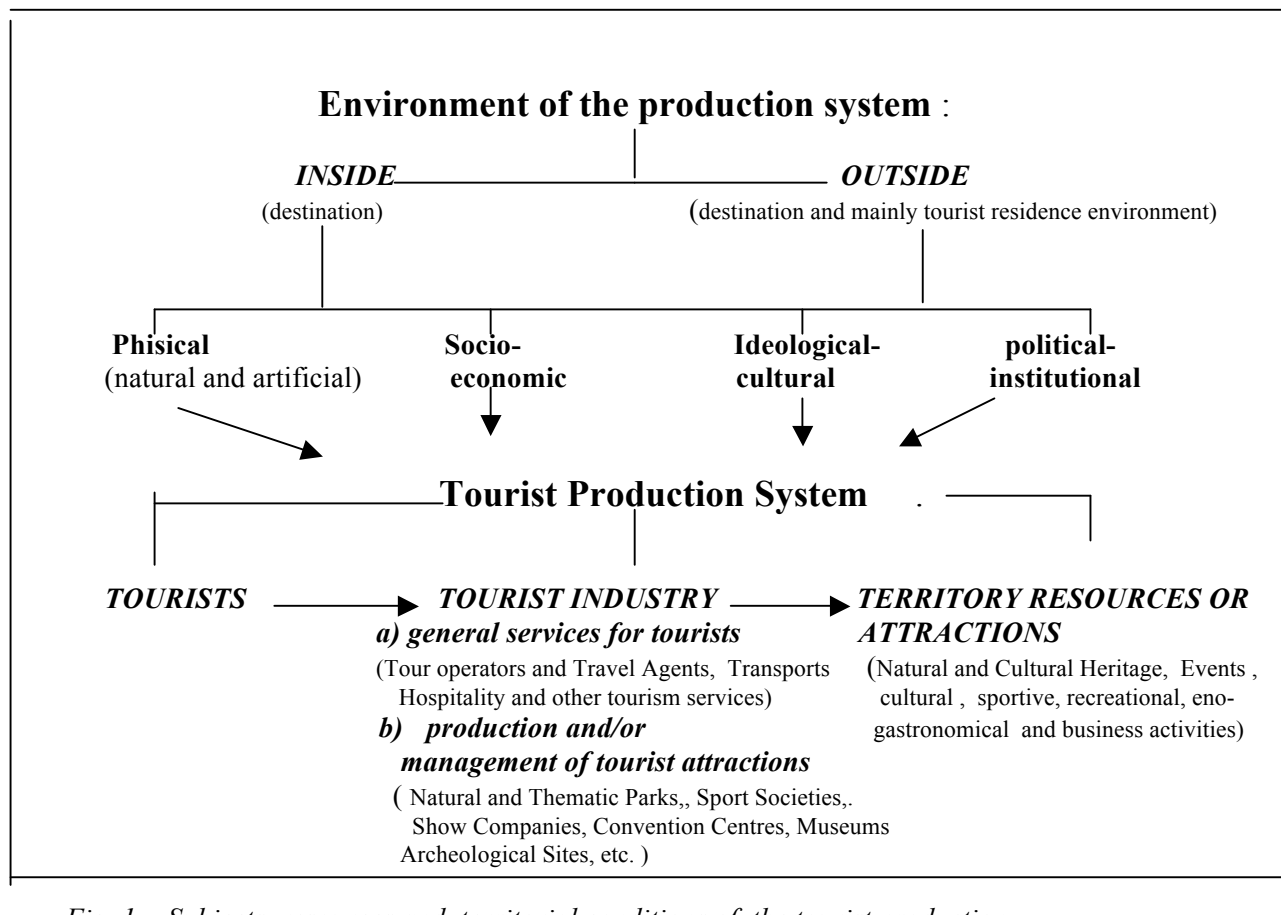


Fig. 1 - Subjects, resources and territorial conditions of the tourist production

Fig.2 - GLOBAL COMPETITION AND LOCAL ENVIRONMENT

