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EUROPEAN TOURISM REGIONALIZATION AND GLOBALISATION

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Tourism holds an important stake in the present day phase of globalisation, characterised as it is by the acceleration of technological progress in communication and transport sectors. At the same time, its potential imparts dynamism to the network of inter-population socio-economic relations, not to mention transformations in progress in productive areas and geographical space. Such considerations justify the growing attention directed at tourism on the part of members of the academic, scientific, political, institutional and entrepreneurial world.

The analysis of official statistics¹ on tourist supply and demand and the interpretation of socio-economic changes occurring in the European Union which have influenced consumer choice, on the one hand, confirm the relevance of tourism in Europe and, on the other, lead to the consideration that the tourist sector is far from reaching saturation point: From the 1960s onwards the sector has not suffered any easing up effects, despite the onset of collateral events (such as natural calamities, epidemics, war conflicts, problems of public safety and so on), which have simply had the effect of slowing down the rate of growth in specific periods.

A case in point is that of the terrorist attacks of 11th September 2001, which generated a strong impact on world economies generally and on specific sectors in particular. Consequent political developments occurring subsequent to the disaster in the USA have further reinforced the uncertainty felt by the market, by businesses and by consumers. In this context, even the tourist sector has recorded losses, as is attested by the decrease in the number of presences of international tourists in Europe (400.3 million) 0.6 % as compared with the previous year. Even if there has been a reduction in the growth of a sector which is used to constant positive trends, it is encouraging to note the extent to which tourism is stable, in that the crisis was only temporary and less incisive than had originally been expected. A simulated scenario implemented immediately after 11th September 2001 forecast an extremely negative economic impact on the sector in question, with serious repercussions on GDP and on world employment levels. However, the European Commission, on the basis of widespread consultation with representatives of the Tourist Industry, with the competent Authorities of the member States as well as European and International

¹ It is as well to point out that the issue of statistics regarding tourism – determined by uncertainty regarding the reliability of data collected by the various European countries, by the numerous means of collecting and publishing data, by the existence of several data collecting agencies and by the delay in publishing official data – has evolved in a positive sense but is far from being resolved. In this direction the purpose of the Directive 95/57/CE of the European Council of 23rd November 1995, relative to the collecting of statistic data on tourism, was to establish a coordinated system of information regarding tourism in the European Union, and to classify data collected within Member States into 3 broad categories:

- quantity/capacity of tourist accommodation on a collective scale, including territorial units (Nuts I-III);
- arrivals and departures (national and international) to and from tourist accommodation on a collective scale;
- tourist demand (national and overseas) without taking into consideration day trips.

However, from the elements analysed, the objective aimed at by the Directive does not seem to have been reached nor, has much progress been made in terms of knowledge of tourism and its relative economic impact, which, although evident and empirically perceived by observers, at the present time is still unable to be calculated with any great degree of certainty. Even the Regulation no.58/97 of the European Council relative to structural statistics on enterprises has contributed to the collecting of coordinated data (turnover, added value, employment). Finally, in September 1999 EUROSTAT, the Organisation for Co-operation and Economic Development sector (OCED) and the World Trade Organisation (WTO) set up a work group to define the methodology for monitoring the satellite accounts of tourism (CST) in order to increase coherence and international comparability of the statistics involved, as well as to enable a more satisfactory assessment of tourism on a national scale and its commensurate importance on a global economic scale. In order to examine the feasibility and the elaboration of CST in the countries which intend to involve themselves on this level, the Commission's long-term Programme (2001-2005) of funding enterprises and enterprise creating, in particular small and medium sized firms is underway.

Associations, did not find confirmation of the above-mentioned perspective. On the contrary, the Commission together with the World Tourism Organisation concurred in maintaining that these negative events did in fact in the short term, influence certain kinds of tourism, or rather, the choice of tourist resorts or further, the way of travelling, but in the medium-long term period they have not produced specific effects on tourism, and the impact on economic growth and on employment has been mitigated by the destination of the cuts in tourist spending to the advantage of other goods and services.

With its geographic, historic-cultural and environmental diversity and with its density of tourist attractions, Europe is the most visited area in the world. Obviously, tourist flows in the next few years may well be re-distributed geographically speaking, above all considering the discovery of new destinations both in Far East countries and in the Pacific, but the volume of European tourism – in terms of movement (incoming and outgoing, as well as number of over-night stays) – should almost double within 20-25 years, even if it has been calculated that the percentage of international presences would drop from 57.8% of 2000 to 52.4 % in 2010 to 45.9% in 2020.

Tourism has become global because the geopolitical opening of borders has made the borders themselves more penetrable and encouraged more people to move about for diverse reasons. Tourism has become complex because of the scenarios of reference, the evolution of life-styles and the characteristics of demand, to the point that enterprises of any size are required to demonstrate a growing capacity for control and management of technological, financial, organisational and training variables that interact within the system of production. Tourism has become flexible because new markets coming onto the world scene, on the one hand, provoke new flows of demand and on the other, create additional supply which is often dynamic and active.

These characteristics lead to a raising of competitive levels and to a widening of the geographical scale, as the benefits of destinations, the visibility of travelling conditions, the attention on the part of the clientele to external factors (as for example that of the environment and awareness of the quality-price ratio) increases. Certainly, the opportunities of growth of this sector are not lacking and as has been said before, would seem to indicate that these trends are positive, however for no single State is there assurance that there will be privileged positions for the future.

Globalisation which aims at and implies, amongst other things, the overcoming of national barriers and greater solidarity, functional integration between economic activity localised in different nations, the intensification of social relations and the free circulation of information on a planetary level, constitutes a factor of tourist development, even in terms of new client acquisition, but in the meantime, generates problems of an economic and social nature which can be managed only in terms of concerted regulations and with the development of the capacity both of immediate reaction to changes in tourist preferences, or even the anticipating of such preferences and the assessment of the quality of products or services compared to those of other regions.

The tensions provoked within this sector are of an economic nature, in that the different models of supply familiar thanks to global marketing imply processes of redefinition of positions, of roles and of specialisations in the world tourist system, because the increase in tourist flows overloads the connections of the infra-structural network in above all, certain periods of the year and requires co-ordinated planning of the different areas (transport, territory use, building, social services etc) as well as of the environment, because new models of tourist consumption are often sources of pollution, congestion and degradation, and, therefore, reduce the quality of living standards of the local populations. Furthermore, in the face of evident drives towards uniformity reinforced by processes of re-distribution of resources and of populations, and imitation of models of consumption and production; there is greater diversification, which recommends the implementing

of policies of enhancement of local specifics and safeguarding of the tourist patrimony in order to improve territory benefits and organisation.

When national sovereignty was a non-debatable issue, the Governments of individual States were the principal actors on the world scene and autonomously handled internal situations which involved the populations of the States they represented; nowadays, economic powers, responding to supra-national demands, are more difficult to control and the interests of different countries are often in contradiction with one another. This demands on the one hand, the reinforcement of competitiveness by means of development of factors of local attraction and advantage based on the characteristics of the place in question and territorial vocations and on the other, the positioning of local contexts within the world economy circuit, constituting complementary relations between tourist systems and investing resources both from the public and private sector, in consolidating networks of communication and of transport in support of the process of integration.

The diversity of this sector together with the diversifying nature of its components explains why for so many years tourism has never had a clear sector identity and has been relegated to scarce visibility on the political plane, certainly not corresponding to its importance in social and economic terms. Hence the necessity to rethink the measures regarding tourism in terms of closer co-operation and participation (not least because they are broadly disciplined by principles of subsidiarity) bringing them not only under the aegis of the various Directorate Generals of the European Commission, but also in terms of active participation on the part of Consulting Committees of Member States in accordance with other European and National Institutions, as well as in concert with the representative Organisations of the sector.

On the basis of a SWOT (strengths, weaknesses, opportunities, threats) analysis of the sector the principal lines of strategic action to follow have been identified for European tourism to contribute in terms of distribution spread over territories, sustainable development; the re-modernisation of the sector, the reinforcement of competitiveness of enterprises, exploitation of the potential of local systems of tourist supply, the enhancement of European integration in a world context, and not least, the promotion of tourism in terms of responsibility.

Given that global economic development remains a priority concern, development policies must be projected towards the balanced development of different regions. Included in the activities susceptible to accompanying or accelerating the socio-economic take-off in depressed areas in Europe, tourism would seem to be a strategic variable.

Starting from the considerations that:

- in global terms, tourism in the European Union represents a good 5.5% of GDP and 6% of the employment rate and in some countries (as for example in Spain) these percentages rise to 10.5% and 9.5%;
- tourism will be a precious source of job creation (about 3 million new jobs are envisaged within the next decade) especially in slow developing regions and peripheral areas;
- tourism - being founded essentially on the employment of territorial resources, in the widest sense of the term – has the capacity to trigger off local identity enhancement processes.

The European Community can and does no longer under-estimate the importance of the tourist industry in the European economy and its contribution for cementing policies of cohesion, convergence and integration within the Union itself.

In Europe there are more than 18 million small and medium sized enterprises (SMEs) of which approximately 8% are in tourism, and which, having a central role in the constitution of European Industry, are key factors of European Union efforts to stimulate economic growth, competitiveness,

job creation and the integration of the Market thanks to their dynamic/flexibility “potential” required by global markets, and to the rapidity of decision and change imposed on them by new technologies and by the e-economy. Therefore, the purpose of intervention should not be to transform specific aspects of the European tourist industry system, characterised as it is by strong vocational -artisan tendencies and by marked human rapport perspectives, but rather, the enhancement of these characteristics by improving the context in which these firms operate, strengthening support by means of instruments and financial programmes, and encouraging co-operation and aggregation.

Several community initiatives have dealt with some of the problems of SMEs and numerous policies have been adopted by Member States in accordance with the principle of aiding those less fortunate, so as to render the performance potential of these firms and to stimulate entrepreneurial productive activity. It is still necessary however, to contemplate specific interventions for tourism firms in order to meet particular needs and at the same time to enable these firms to participate fully and actively in the process of European development, based on knowledge, on sustainability, on quality and on information and communication.

Such an approach is the only one feasible, above all in the context of the re-organising of the European Union, that has led to the delegation of competence as regards tourism to the Directorate General for Enterprises, and in particular to Directorate D (responsible for Services, Trade, Tourism, e-Business & IDA), guaranteeing in this way, a greater availability of economic resources and a greater force in political terms. Actually, the choice, questionable to say the least, but closely connected to the narrow perspectives and lack of initiatives of the previous Directorate General XXIII (Tourism Unit) and subsequent to the signing of the Treaty of Amsterdam, where tourism does not figure amongst European policies – It is evident that the Directorates of the European Union consider tourism an economic-productive issue rather than a socio-cultural one. The outcome is that even less attention is effectively paid to the sector which now constitutes part of a much wider sector, namely, that of Industry. This presents remarkable problems in terms of strategic worth to the European challenge.

Continuing along these lines – despite the awareness of the importance from an economic point of view, of tourism for growth and employment in the European Union, the necessity in the context of community policy for harmonious action and co-ordination on an institutional level – seems even more serious to the writer who in 1996 personally took part in the European Week of Tourism organised by (the Department of Tourism - Italian Prime Minister’s Office – the European Commission Directorate General XIII (Tourism Unit) and held in Naples during the Six Month Term of the Italian Presidency. At the end of this event the Councillors of the Italian Regional Government Tourism Sectors presented a motion to the Government and to the European Parliament, for a specific Article on tourism to be inserted in the Treaty so as to establish an independent, multi-disciplinary and multidimensional policy so as to:

- improve the competitiveness of community enterprises in tourism and to create the conditions to ensure their development, above all as concerns small and medium sized enterprises, by adopting similar dispositions relating to other sectors of the economy established in Article 130 of the Treaty of the European Union;
- adopt measures destined to improve and to harmonise working conditions, training of the professional staff involved in activities in the tourism field in order to extend their range of future perspectives and to re-launch occupational levels;
- promote the co-operation and the co-ordination of instruments and services in the European Union operating within the framework of community policies.

On such a premise, until the lack is redressed of an official Institution whose task it is to elaborate integrated policies based on a community scale global perspective of tourism not to mention specific articles relating to tourism, at least the Enterprise Directorate General should define more qualified and more incisive strategies for the sector.

To increase the competitive capacity of tourist enterprises interested in competing on internal markets and on larger scales, careful attention and commitment should be directed at reinforcing an entrepreneurial mentality in terms of validity and precious client centred human resource skills in the context of a pronounced culture of service. Tourism flourishes when someone with an idea achieves it, risking failure or even insolvency. The fact that Europe has not reviewed current legislation, (amongst others an extremely punishing factor), does not encourage initiatives which from the very start, involve considerable investments in terms of capital and human resources, not to mention the payment of heavy social contributions. Skills, motivation and adequate advice, preliminary measures aimed at ensuring the dissemination of an entrepreneurial education and general knowledge of the economy at primary, secondary and university education level, greater correspondence of qualifications to the needs of enterprises, new forms of entrepreneurial activity for young people and women, efficient services of information and co-operation and networks of support, are all necessary and would concur in guaranteeing conditions of success.

Given that the community tourist offer is characterised by a high number of small and medium sized enterprises, it is relevant to ask whether the low propensity towards dimensional growth is arbitrary or whether induced by restrictions of a different nature i.e. institutional, fiscal, financial and regulatory. To overcome these restrictions and to aid freedom in entrepreneurial development, concerted action on a European scale is required. Only the co-ordination of structural reforms can encourage each Member State to adopt economic policies that are coherent with the priorities defined by the Community in the direction of reinforcing the freedom of enterprises in an economy open to international competition. The simplifying, the reducing and the re-organising of administrative procedures which regulate the relations between Enterprises and Public Boards play a significant role, in helping both to recover transparency and efficiency in Public Administration, to achieve the fusion of national markets into a single European dimension, and to augment the competitiveness of products and services. Another challenge consists in eliminating delays of an administrative nature, rendering both the existing regulations as well as future regulations, as simple and clear as possible, and compatible with achieving related objectives in terms of public policies.

The plan of action for the development of tourist enterprise must be at one with the creation of a climate favourable to the dissemination of a process which holds strategic importance for an economy based on knowledge - innovation. Information Technology and Communication (ITC) is a fundamental support for tourism, because it determines advantages in terms of reduction of costs of co-ordination and of office personnel (substituted by computers), as well as improvement in the organisation of distribution, factors which contribute to ensuring greater efficacy in meeting variations in demand, increase efficiency, reduce prices, in other words reinforce competitive positioning. Information Technology both removes the physical isolation of peripheral areas of the Union and increases their "virtual" isolation to the extent that the key to development is the access to technology rather than access to markets. Therefore, it is an instrument by means of which underprivileged regions can join more developed regions, not just simply by imitating results already achieved but rather, by trying to lay foundations in accordance with their specific characteristics and needs and by adapting to the conditions of competitiveness of the tourist market global economy. Nowadays, it is widely recognised that the ability of regional tourist economies to sustain competition and to conform to change is connected to their capacity for innovation: the growing

importance of knowledge as well as of human resources and of infra-structure in determining competitive travelling includes technology among the priorities of regional development.

Tourist operators, social parties and the institutions must commit themselves and work towards adapting to these new perspectives in good time. Networking, an operation which is now simple thanks to a combination of new technology and traditional instruments, is a fundamental instrument for improving access to and dissemination of information, for intensifying partnerships, promoting trans-European co-ordination, increasing synergy and augmenting competitiveness of the European product offered.

A fundamental barrier to the dissemination of such a process is the scarce qualification of human capital, considered in terms of a broad range of professional competence (from high profile scientific knowledge and education to that acquired through practice and perfected as a result of life-long education). The qualification of human resources – the need for which is justified also by the fact that the improvement in the quality of living standards and the reinforcing of cohesion are factors that influence business competitiveness to a great extent, highlight European prosperity and guarantee the sustainability of the social model – contributes to the growth of productivity, both in terms of accumulation of knowledge and its dissemination, and in tailoring the demand to the supply of different competences, variables which at the present time, being of unequal weight encourage seasonal employment and mobility of the labour force.

If small and medium sized enterprises are able to adapt to change more readily, they are also the structures that meet most difficulty in the application of innovation, above all due to the limited number of highly qualified professional figures and to the lack of recognition on an international scale of their relative qualifications, the direct consequence of specific obstacles to the upgrading of professional conditions: lack of labour force, a weak image of the sector, the seasonal aspect of the work and scarce competitiveness. In the light of such a situation it is necessary to adopt global solutions based on partnerships and dialogue, mediation between training institutions, the tourist industry and public authorities, imposing stricter collaboration on them, both in the creation of a permanent observatory for training, employment and working environments to collect, monitor and supply strategic information: both in terms of staff training (on a professional level elaborating strategies and classes of competence functional to the practice of international systems of certification especially in terms of permanent, in-service and complementary training) defining links between training and professional experience as well as identifying measures that allow a gradual passage to retirement, without the risk of dispersion of acquired knowledge. The advantages to be derived from such an approach would concern in particular, the encouragement of access by specialised units to the tourism labour market, the increase of their competence, the prolonging of employment time spent by the workforce in the sector, the support to small and medium sized enterprises in increasing lasting competitiveness.

Such approaches are closely connected with those concerning salary alignment where increases in real terms must take into account the diversity of the professional profiles and should not exceed the growth of labour productivity, considering the need to reinforce and successively maintain the income benefits of investments destined to increase professional capacity and job creation.

Besides reform of the fiscal systems to contribute to success and to encourage enterprises in their initial stages and above all, in their expansion stage, co-ordination of the fifteen fiscal systems (the case in Italy) is imperative (in fact the Government is at present taking tentative steps in these two directions), so that the tourism market can be influenced positively and optimum placing of the resources be coordinated. The absence of coordination has direct consequences on the

competitiveness of European Enterprises on the world market and increases the risk that the Member States could speculate in a fiscal context in order to attract investments.

Even financial systems need to be adapted both to improve relations between banking and business contexts by envisaging new conditions of access to credit and risk capital and by speeding up procedures of assessment of requests for contributions and services of Commission on the part of financial intermediaries. Criteria of eligibility for structural funds also need to be reviewed so as to guarantee that the resources of the Community are effectively used for development of the tourism sector and during whole enterprise life-cycles. On the other hand, entrepreneurs, in order to transform their ambitions into reality, must have funding available, (which market at the present time has many shortfalls in terms of seed capital and micro-credits -in the initial phase - the issue of shares -in successive stages- and of guarantees that could encourage new sources of funding in terms of shares and credit - throughout the entire period of the initiative - and conformity with regulations should be ascertained beforehand in terms of State contributions.

Finally, as far as the regulation framework is concerned, the Commission should establish specific exemptions from legal obligations, to reduce the burden on enterprises and should impose strict observation and application of regulations concerning late payments; in order to guarantee SMEs access to new markets, competitiveness and competition under the same conditions. At the same time the Commission should veto mergers, practices and agreements directed at creating pre-dominant positions or at limiting competition. The idea is that these provisions do not lead to a sharp concentration of enterprises, but place the accent on the fact that the increase of productivity is determined by interaction amongst enterprises, by the accumulation of knowledge and by the recourse to actions that the market has shown to be the best. This scheme implies that on a community scale, policies are formulated so as to encourage the growth of enterprise and innovation, but at the same time are able to ensure that all the operators involved are subject to regulations in conformity. A tourism enterprise policy centred on the above objectives as well as on competition which is imperative, sharing the same fundamental vision of development induced by the market and in the phase of being mutually reinforced, should contribute to rendering elevated and sustainable productivity possible.

The structure of the world market very often induces enterprises to implement forms of co-operation that can be translated into a constitution of networks. Even if in most cases, such a scenario does not pose specific problems under the profile of competitiveness, in other cases, it can determine the exclusion from particular markets or in other words, impede innovation in enterprises competing with one another. Holding a balance between business policy goals and competitive policy goals is a crucial factor as the synergy between them concurs in creating a favourable environment for the growth of competitiveness: efficacious competition drives tourist structures to seek solutions in favour of improving operative efficiency, while business policies tend to correct the shortcomings of the market.

Finding and exchanging best practice and pilot experience, the search for common solutions, the support and integration of the operators (political decision makers, resort management groups, quality control management, the suppliers of tourist products, commercial intermediaries, training staff, the host community) and links with tourist destinations are the main needs identified, because they are the instrument for achieving effective progress in competitive levels, which as far as the tourism sector is concerned involve territorial aspects too. The impact of the process of globalisation on local economies exists and, on the one hand, creates the need to clearly ascertain local specifics and the vocations of the area considered in terms of strategic assets, as well as forming part of a network with other significant tourist realities, with which to compare and to co-

operate, and on the other hand, to impose the definition of policies for achieving competitive advantages which range from promotion of public and private investments for the reinforcement of physical networks of communication and transport and support of integration to enhancing factors of attraction and enhancing areas through territorial planning which takes into consideration the environment. Local tourist systems and the areas (regions, provinces and cities) which respond best on both these fronts are those which will succeed in obtaining a strategic role in the world tourism economy. Effectively speaking, competitive advantage is obtained and reinforced in the light of processes of development which are strongly localised (and based on diversity in economic organisation, in values, in culture, in the institutions and in history) all of which contribute to success. These are the elements, the essence of which conceptually speaking, can be found in terms of organisational and territorial efficiency. They must be measured for the purpose of effective competitiveness in a local tourism system and, eventually, for re-formulating the strategy of development employed.

In other words, tourist enterprise policies must favour the growth of the more competitive business enterprises and, consequently, contribute to the achieving of European Union objectives in terms of employment, social participation, and environmental sustainability. The strategy to employ is one based on a combination of elements and principally, the search for an approach based on the development of knowhow and on the transition of Organisations, administrators and businesses towards the society of information; the aligning of GDP (in terms of product quality, availability of competent human resources, innovative methods of management) in correspondence with market evolution trends, the integration of policies that have an impact on the sector, and respect for the principle of aid which establishes the responsibility of the different operators.

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