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**PUBLIC POLICY AND MODELS FOR INTEGRATED
TERRITORIAL TOURISM DEVELOPMENT: THE ITALIAN
CASE OF THE REGION OF UMBRIA**

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PUBLIC POLICY AND MODELS FOR INTEGRATED TERRITORIAL TOURISM DEVELOPMENT: THE ITALIAN CASE OF THE REGION OF UMBRIA

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abstract

The central topic of this contribution is an analysis of the development of the local tourism systems, which has generally involved the Italian regions where, dating from the respective laws actuating the national tourism reform law nr. 135/2001, an interesting and innovative experience has been developed to define a new model of aggregation for integrated tourism development. A new model for governance of the local tourism system based on public/private partnership, where the public institutions and the private organisations reach an agreement in the formulation of local development projects. In particular the paper aims at understanding the evolution of the models of tourism organisation that have characterised the Region of Umbria, a region in Central Italy.

Key Words: Cooperation, public/private partnership, models for integrated territorial tourism.

1. introduction

The central theme of this contribution is an analysis of the development of the Local Tourism Systems (hereafter called LTS), which has involved Italy generally. Dating from the related laws implementing the national tourism reform law nr. 135/2001, an interesting and innovative experience has been developing in the Italian regions, aimed at defining an aggregative model for the integrated development of tourism on a local level. A new model of governance of the local tourism system, based on a public-private partnership, where the public institutions and private organisations agree on the formulation of local development projects and for the integration of other production realities with tourism. In particular we will analyse the evolution of the models of tourism organisation that have characterised the Region of Umbria, a region in Central Italy with 840.000 inhabitants characterised by a multiplicity of attraction factors and of micro-destinations, traditionally inviting for the reduced and pleasant dimensions of its territory. The aspects of integrated planning and of the capacity of the local subjects to collaborate to promote a single tourism offer which enhances the common patrimony present in the region, will constitute the main focus of the analysis. In Italy, the framework of competencies in tourism has changed profoundly, since the constitutional reform of Heading 5 (constitutional law nr. 3/2001) placed tourism under the exclusive jurisdiction of the Ordinary Statute Regions, by not including the topic in the list of concurrent regional competences nor in that of the exclusive competencies of the State.

The reform of Heading 5 of the Constitution, on one hand has certainly enlarged the legislative authority of the Regions, conferring on them the power to decide the organisation and articulation of the competencies in the matter, but especially it has constitutionalized the principle of subsidiarity as the main criteria for the attribution of administrative functions, confirming the centrality of the role of the Cities.

In the broad frame of the changes that have taken place in the public administration and in the disposition of local policy (Segatori, 2004, 2007), already in the second half of the 1990's in Italy the Regions passed copious laws on tourism, both to adapt their own organisational models, and to redistribute the administrative functions in actuation of the principle of subsidiarity introduced by administrative federalism and later to introduce into their own systems the principles dictated by the constitutional reform of 2001, as well as by the new national reference legislation.

2. local tourism systems in Italy: definition

In recent years the role of non-governmental actors in political decisions has caught on as an important topic even in the tourism sector. We are witnessing an opening of the local social systems that move with several partner relations (Peters, 2008) and which activate collective

reflections, efficient and creative, built on different competencies and well-defined roles, to delineate a local system that is coherent and suitable for the realization of a particular project for tourism enhancement. Public tourism policies propose collaborative decision making models characterised by dynamics of policy downscaling.

Tourism is increasingly oriented towards an approach to public policy that fosters and enhances the participation of non-governmental actors in the formulation, actuation and monitoring of the policies connected to it (Ruzza, 2009). With ever-growing frequency, organisations of civic society make new cognitive contributions to the decision-making process that are necessary to respond to the complexity of tourism policy. In the area of studies on tourism (Fayos-Solas, 1996, Palmer 1996, Bramwell and A. Shaman, 1999, Bramwell and Lane, 2000, Pfoor 2002, Dredge 2006, Scott, Baggio and Cooper, 2008) it emerges that this sector is characterised by the involvement of different territorial decision-making levels, which share in producing local development, and by a quantity of stakeholders.

In this renewed context, where local governments are re-interpreting their roles and their reciprocal relations, the LTS are a response to the rise of innovative ways of conducting public functions.

The LTS are defined by article 5 of the national tourism reform law "homogeneous or integrated tourism contexts, comprising territorial areas belonging even to different regions, characterised by the integrated offer of cultural, environmental wealth and of tourism attractions, including the typical products of agriculture and of local crafts, or by the widespread presence of individual or associated tourism enterprises". The LTS are an example of a partnership for local development (de Salvo 2007, Golinelli e Trunfio 2007), with an explicit involvement of public and private actors, founded on the principle of joint responsibility (Brunazzo, 2004), or the simultaneous association of different interdependent subjects in the same area of intervention for the pursuit of a common goal, which is the tourism development of the reference territory. Therefore the organizational structure foresees the mandatory presence of public authorities and private subjects and the public actors involved can belong either to the same territorial or institutional level, or to different levels of government; in fact there are many experiences in Italy of infra-regional LTS.

The role of the regions is limited to a simple activity of recognition, fostering the consolidation of bottom-up organisational paradigms that disregard adhesion to concepts of administrative distribution, where the territory, represented by its various components, aggregates around a tourism development project. While in the national law the development project is the aspect founding the LTS, usual procedure demonstrates that the projects become corollaries and remain in the shade with the more traditional functions of tourism communication and promotion prevailing.

The partnership construction process in LTS has not always been a spontaneous decision on the part of the local actors to unite their efforts to face the problems

of the tourism development of their own reference territory. The catalyser of collective action is represented by the same regulatory provision and by the opportunity of prefiguring to the local subjects the possibility of funding offered by a systemic policy and not always by the need to supply responses innovative for local tourism development.

This situation has determined a weakness and difficulty in consolidating the experience of the LTS, despite the fact that they have certainly fostered the spread of a general consensus on the method of orchestration and on the constitution of networks even in the tourism sector.

3. the tourism organisation model in Umbria before national tourism reform law nr. 135/2001

The Umbrian institutions have always been sensitive to the processes of functional and organisational reform of the tourism sector. The awareness that tourism no longer represented a marginal sector of the economy, even because of the industrial crisis, induced local government to create an appropriate system of tourism policies in their regional development strategies.

Umbria was one of the first Regions in Italy to regulate the sector: immediately after the emanation of the first framework law on tourism, l. nr. 217/83, with the regional law nr. 7/84 the assumption of the denomination of tourism promotion agency by the local tourist boards and just two years later, with the regional law nr. 32/86, in actuation of the national provisions, the functions and organisation of the twelve *Aziende di promozione turistica* (hereafter called APT) being instituted were regulated in detail.

The search for innovative models, the response to the cycle of administrative reforms of the 1990's has hastened the regional public bodies in modifying its institutional role, its territorial areas, action strategies and the model of tourism organisation which saw the APT as the principal actors. Many regions have suppressed the APT positioned locally in favour of the provision of regional APTs and have attributed new competence to the Provinces and Cities. Along the same reforming lines the Region of Umbria, with regional law nr. 20/96, instituted a single regional APT, a structure re-entering in the so-called indirect regional administration. The reform of the regional tourism organisation constituted one of the topics of the programmatic declaration of the then regional government and reflected the most ample institutional project for the constitution of the so-called light Region, which called for a generalised simplification of the public administration, a lightening of the structures, a concentration of the functions and a greater rationalization of expenses. In fact it should not be ruled out that the choice of "verticalising" public tourism promotion policy, tempered by the participation of the local territorial bodies (the Associated Tourism Systems

Sistemi turistici associati-STA were also instituted in the sites of the old APTs to cooperate in the work of the Cities), may have been dictated by the need to contain public spending. The new organisational model has certainly avoided fragmentation of funding and has led to a decrease in the amounts destined for the functioning of the *aziende* themselves.

4. the emergence of governance networks: a new paradigm for Umbrian tourism policy

In 2001, with regional law nr. 29, the Region of Umbria was in Italy one of the first regional administrations to adapt its regulations regarding the tourism organisation to the decentralisation process and to the provisions of the new national law, especially with regard to Local Tourism Systems, identifying these as a fundamental articulation of the infra-regional organization and an instrument for starting up new collaborations between public and private. With the regional rule nr. 6 of 22 November 2002, the regional council recognised the LTSs of *Alto Chiascio*, of the Central Tiber Valley, of Assisi, of the Perugia area, of Trasimeno, of the Terni area, of the Upper Tiber Valley and of the Valleys and Mountains of Ancient Umbria.

The new model calls for two different levels of intervention in the creation and decision of regional tourism policies. The first is characterized by the promotion of general and strategic actions that was formulated by the Region in its three-year tourism development plan; the second level, belonging to local promotion and information and welcoming policies, is a competence both of the Cities, responsible for the valorisation of tourism resources even in associated form through the constitution of Associate Tourism Systems (*Sistemi turistici associate – STA*), and of the LTS.

In Umbria, as in other Italian regions, often the LTS have confused the political role with the technical one, assuming operational functions that belong to the promotional bodies, carried out often in ways that are not coherent with regional planning, not succeeding in qualifying themselves as a place of ideas and of creative intelligence in which the three elements indispensable for tourism development of the territory blend: a development programme with the related projects to put it into effect, an understanding between public and private subjects and the territory itself to which the programme and the understanding make reference. The LTS should have been innovative organisations of information and knowledge useful for the development and competitiveness of their own territory. Unfortunately in Umbria the LTS have determined a cumulative type of tourism development, for increase and addition of functions, limiting the emergence of a model more tied to the real needs of territorial development. The systemic orientation of the actions of the LTS, has not developed a systemic development of tourism policies in the region; an empirical analysis of the regional territory indicates the

coexistence of various systemic forms (ex. GAL, group of local actions)¹ which, in certain circumstances, conduct the same initiatives determining conflict or duplication of the financial resources allocated, but also continual organizational and functional overlapping with other subjects of the territory

5. a new local tourism governance method: Product unions (*Unioni di prodotto*) and Area products (*Prodotti d'Area*)

The awareness to construct an integrated system for the overall promotion of the resources of the region, is one of the topics of the programme of the legislature for 2005-2010. A need emerges to "imagine a robust phase of innovation and evolution in tourism policies, promoting on a regional scale an initiative able to integrate the various territorial and sector policies and to involve so many public and private actors". Consistent with these considerations, in the programme the will of the Regional council to propose a new re-organisation of the public functions regarding tourism is made explicit, in particular of "those involved in promotion activities, with the intent of seeking greater coherence and effectiveness in regional policies and in the actions that the various public entities put into play".

In 2006 law nr. 18/06 was enacted which, with respect to and in implementation of the main points of law nr. 135/01 provides a detailed regulation of the tourism sector intended to enhance the regional tourism context through integrated inter-sector policies.

Regional law nr. 18/2006⁽²⁾, modified in a substantial way the asset of Umbrian tourism from the viewpoint of the distribution of administrative functions, which, in harmony with the revised Heading V of the Constitution, have been assigned to the system of the local bodies according to the principles of subsidiarity.

The need to pass on to a different, more innovative model of *governance*, with equal and integrated relations among the various subjects involved in local tourism development, constitutes the *ratio* in the new legislative intervention which proposes a new model of *governance* of the valorization and tourism promotion of the regional territory, based on new organizational models such the Product unions (*Unioni di prodotto*) and Area products (*Prodotti d'area*).

In article 9, the new law proceeds to distinguish between projects and integrated and collective products, the latter defined as area products, identified as privileged instruments for the implementation of regional tourism promotion policies. To strengthen the integration experiences present in the territory, and avoid development models that presuppose an accumulation of

competences and of new subjectivity, the Region supports the formulation both of product projects and of territory projects, that are expressions of already existing networks of public/private partnerships and which share both the formulation and the implementation phases of these. The new system calls for the choice of various tourism products, from those considered more mature with wide consensus among operators, where the intervention of the region is limited, to those for whose creation a consistent intervention of the Region is necessary. In its Three-year Document of Strategic Direction 2008-2010, the Region of Umbria has provided indications of the topics considered strategic for regional tourism development, in particular food and wine, culture, sport, the well-being circuit, the topic related to the rural nature of the region, great events and congress tourism. The integrated projects will be implemented by the Product Unions, an experience of integration between public bodies and businesses, but with a prevalently public nature, already present both on a national and international level, while the Area Products that result from the integration of a multiplicity of historical-cultural, environmental resources and those related to quality artisan and food-and-wine productions, could be constituted by public and private operators and could even assume the denomination of LTS.

With regard more specifically to this last aspect, the new regulation does not provide expressly for the abrogation of the old LTS, and the possibility that the new integration expressions can continue to use even the LTS denomination, could create confusion, because it is not clear whether the new organisational models will substitute the old ones or flank them. Certainly integrated and collective projects and products and area products determine a new organisational paradigm based on open relations that must assimilate the various needs of the territory; thus in its formulation the new model seems to be coherent with the natural tendency toward aggregation that characterizes the current phase of the organization of the tourism supply and that permits contacting the various tourism markets with greater professionalism and effectiveness. In coherence with this evolution, the constitution of Product Clubs is also underway in the region. In particular the Product Clubs should provide the Unions with operational instruments that permit the various actions to be better targeted and more coherent with the needs of tourism demand, without creating new bureaucratic structures.

The governance of tourism in Umbria seems to be increasingly oriented toward bottom-up integrated policies, collective actions, where a diversified network of subjects organize around a specific tourism product or territory. The new regional tourism development strategy certainly valorises the information, knowledge, processes and phenomena already active in the territory and is intended to consolidate the close tie that must exist between the production of knowledge and territorial action, but still has difficulty, especially for its organizational profile, passing to the implementation phase.

¹ Gal is a public-private partnership for the local development of rural areas

² Among the innovations, we point out the unification, into a single text, of the new regulations on tourism organisation, hospitality structures, business activities and tourism professions.

Regional policy emerges as still being too little evident and it recognises itself too much within a summation of programmes, interventions and regulations managed by centres of political and administrative power which seem to have visions that differ too much from each other.

6. the Tourism – Environment and Culture supply chain

The programme for the integrated *Turismo-Ambiente e Cultura* (Tourism – Environment – Culture) (hereafter called TAC) supply chain sets off the organisational models and the regional tourism policies. Among the strategic actions that were identified by the contracting parties of the *Patto per lo sviluppo dell'Umbria* is that related to the "*Tutela e valorizzazione della Risorsa Umbria*". *Risorsa Umbria* was an objective of the earlier legislature, 2000-2005, that identified in the valorisation of the entirety of the regional resources, one of the principal elements in which to invest to improve the quality of life of the Umbrians and at the same time to valorise the tourism attraction potential of the territory. In support of the *Tutela e valorizzazione della risorsa Umbria* action the programme for the TAC supply chain was adopted to be implemented through the pursuit of specific objectives, including:

- The construction of the conditions of system between the wealth and cultural activities, wealth and environmental services, activities and rural environment, artistic craftsmanship, tourism for the integrated valorisation of the territory.
- The quantitative and qualitative development of the hospitality supply.

With the executive act nr. 9086 of 21 October 2004, the region of Umbria approved a multi-measure call aimed at contributing to the realisation of the TAC supply chain and able to "integrate policies to protect the environment, cultural wealth and conditions of life for the valorisation of the regional tourism system, in function of low environmental impact and quality-oriented integrated economic development". The call was strongly oriented towards encouraging not only projects that had the objective of integration among the topics of culture, environment and tourism, but also sustained the presentation of collective projects ⁽³⁾ with particular attention to those presented by groupings of private businesses and public bodies. The topic of integration was an important feature of these calls: for the first time the importance was expressed of the collective nature of the projects that had to involve several entrepreneurial subjects through the synergy of actions of various nature,

formalizing with special acts, the role of each subject in the implementation of the project.

Thus as emerged from the Three-year Document of strategic direction 2008-2010 of the Tourism Service, the creation of the supply chain within the individual integrated projects is based on the organisation of types of products/networks on a regional level called "Area Products", an organisational model which, as has already been pointed out, characterise the new regional organizational set up, able to raise the quality tourism and attractiveness of Umbria, through a strengthening of the systemization of resources, structures and services. Three types of Area Products were identified which regard the three fundamental areas of regional resources/potential:

- **Percorrere l'Umbria**, aimed at the valorisation of environmental resources.
- **Sapori e Mestieri d'Umbria** for the valorisation of typical and traditional resources.
- **Storie d'Umbria**, aimed at the valorisation of historical-artistic and cultural resources.

The proposal of the Multi-measure integrated call for the TAC supply chain was in line with the need to propose tourism development policies characterised by a system of multiple partnership relations, which require a continual reconstruction of balances and which start up collective reflection, efficient and creative, built on different competencies and well-defined roles, to outline a local system that is coherent and suitable for the realisation of a certain tourism valorisation product. As is well known, a feature of tourism is the numerousness and variety of the stakeholders, as well as the involvement of various territorial decision-making levels that produce local development. Recently Baggio and Cooper (2008,1) have argued that "*tourism more than most economic sectors involves the development of formal and informal collaboration, partnership and networks*". The theorisation of the TAC supply chain seems to be coherent with this formulation, by activating integration processes and promoting the active participation of private subjects in the policies connected with the valorisation of environmental and cultural wealth and activities.

The Region of Umbria continues to move in this direction. The perfecting and implementation of the TAC supply chain continue to be among the main objectives of regional government on the topic of local development. The TAC projects have in fact produced the realisation of important initiatives of local tourism valorisation and have promoted the constitution of significant public-private synergies which must be consolidated and integrated to constitute forms of territorial excellence.

7. models for integrated territorial tourism development in Umbria

The definition process of the regional model of territorial tourism development to which we refer in this paper is that which begins with the definition of the

³ "Collective projects" means those projects which: a) grouped various entrepreneurial subjects for the common achievement of a single objective, b) placed in synergy different actions of various nature for the achievement of the same objective; c) headed by each participating subject one or more of the necessary actions foreseen, d) formalized relations among the various subjects, through special acts, specifying their roles in the project and in the subsequent management.

Integrated Project for the Areas Devastated by the Earthquake (*Progetto Integrato per le Aree Terremotate - PIAT*), provided for by the Framework Programme Agreement "Feasibility Studies" as part of the Institutional Programme Agreement stipulated between the Government and the region of Umbria, which preceded the Consolidated Programme (*Documento Unico di Programmazione - DocUP*) Objective 2 Umbria 2000/06. "The formulation of the PIAT has represented a contingent need to "form a system" in a territory ravaged by seismic events and extremely variegated in its needs and problems and for which dedicated instruments/resources were lacking".

For the operational planning of the PIAT Regional project units were identified for each of the five "key projects" identified in the first programming paper.

A feature of this programming was the role of direction assumed by the Region, which, while assuming various forms and methods, directed, governed and controlled the integrated planning, ensuring, in all the phases of programming, the participation of the public and private actors. Through the collaboration established, in the area of the so-called Expanded project unit, among the Regional Services, union representatives and the category associations, it has been possible to activate an innovative form of dialog between the regional structure and the interlocutors of the economic-social partnership.

The experience we intend to analyse below is that inherent to the planning of the TAC supply chain, related to the key project "Integrated System Tourism – Environment - Culture", conducted by the aforementioned Project Units making use also of the technical assistance of specialized external structures. In all the planning phases Sviluppo Umbria spa, the regional company for the promotion of local development, to which the task of technical assistance for the PIAT Coordination Committee was entrusted as a priority, also took part.

The project types, which emerged as a result of the complex and articulated work phase of the management and communications of the TAC Project, were identified in "servants" – of system and of public pertinence - and "specifics", defined in both the qualitative and quantitative aspects, for the realization of which the direct involvement of the socio-economic operators present in the territory is foreseen, through the presentation of specific proposals for "collective projects".

The innovative nature and the originality which connoted this planning experience lie on the one hand in the planning methodology, integrally taken from *Agenda 21 Locale*; on the other in the planning contents that were outlined in the concept of the area product (hereafter PdA).

As far as the planning methodology is concerned, a personalised path was studied which, starting with a flexible potential planning developed "on paper", aimed at defining both the positioning and the development scenario of the integrated supply chain environment-tourism-culture, would allow the orientation of the comparison process of the territorial bodies of the 26 towns (area PIAT), with the economic and social operators and the respective representative associations, *Analisis Turístico 11*

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constituted in the Forum of Agenda 21. Within the Forum, the activation of a simulation workshop has allowed the involvement of the principal stakeholders present in the territory – citizens, TAC supply chain and typical product operators, public administrators, a sample group (*Panel Group*) of tourism operators of the reference market, etc. – to share the objectives of the operational planning; make participants aware of their roles in promoting change on the local level and of qualification of the supply chain; identify and clarify the different role that public policies, the initiatives of the private sector and the representatives of citizens could have held in defining an integrated development of the tourism – environment – culture system of the territory; to foster an exchange of knowledge, ideas, opinions among experts of various sectors; to identify and define the strengths and weaknesses of the tourism – environment – culture supply chain in the territory; to develop an action plan to undertake interventions and initiatives to conduct on a local level and in the reference market, for the definition of area products deriving from the integration of the tourism – environment – culture supply chain; to bring out the endogenous potential for entrepreneurship of the supply chain.

The workshop has also allowed a sharing of the evaluation of the externalities and the territorial diagnostic framework for their subsequent involvement in the other planning phases.

The development of planning was, therefore, started up following a strategic process aimed at encouraging and managing sustainable development, that is, a new way of governing the territory and of re-directing development programmes. This path, which was above all a work path, has followed the strategic set up typical of an *Agenda 21 Locale*⁴, adapted to the specific needs of tourism development of the territory and respecting the "centrality" of the Forum.

As far as the context aspects are concerned, planning, developed in this area, has *de facto* made a "marketing choice"⁵, centred on the Area product concept, which has represented and continues to represent one of the main models of aggregation for an integrated tourism development of the Umbrian territory.

⁴ *Agenda 21 Locale* is a document of intentions and programmatic objectives regarding the environment, economy and society underwritten by more than 170 nations in all the world, during the United Nations Conference on Environment and Development (UNCED) held in Rio de Janeiro in June 1992. In particular, Chapter 28 "Initiatives of local governments in support of Agenda 21 (Iniziative delle amministrazioni locali di supporto all'Agenda 21)" recognises a decisive role of the local communities in implementing sustainable development policies, keeping in mind that over 45% of the world's population lives in urban contexts. In this chapter it says: "Ogni amministrazione locale dovrebbe dialogare con i cittadini, le organizzazioni locali e le imprese private e adottare una propria Agenda 21 locale. Attraverso la consultazione e la costruzione del consenso, le amministrazioni locali dovrebbero apprendere e acquisire dalla comunità locale e dal settore industriale, le informazioni necessarie per formulare le migliori strategie".

⁵ *Atlante della Progettazione Integrata Obiettivo 2 REGIONE UMBRIA, FORMEZ – Centro di Formazione Studi, Progetto Sostegno alla Progettazione Integrata nelle regioni del Centro Nord*

The area product has been defined as a “System of organised and marketable supply of goods and services, and of connections among these, made available by a territory to valorise its identity and vocation, with the purpose of improving the quality of life and the power of attraction towards tourists-guests understood as residents”⁶.

From the formulation of the concept, area product planning has provided that it should be the fruit of the integration between the factors “environment and culture” and that it be marketable. At the same time, starting from the first definitions and orientations of the choice of the range of products and modulating the search for the elements necessary to define the integration process (criteria and methods), an early mapping of criteria was identified, on which to design the integrated area product.

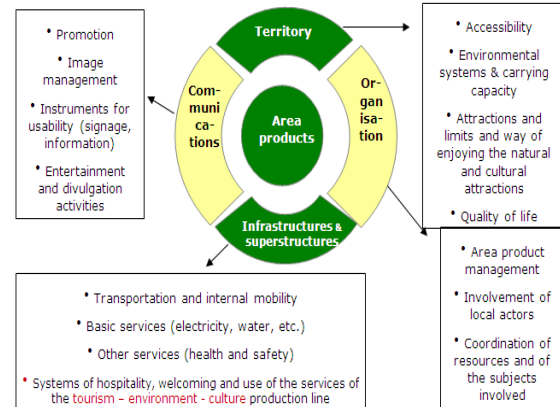
The criteria identified belonged to two different categories:

1. The set of social, environmental and economic criteria (action functions)
2. The set of positioning criteria

As far as the former are concerned, it was held that the area products should necessarily be functional to an improvement in the quality of life of residents and guests, to territorial and temporal re-balancing (de-seasonalising and territorial redistribution), to stimulating the growth of a tourism and hospitality culture, to animation for the valorisation of the existing economic fabric (valorisation of farm products, crafts, etc..) and to the creation of new entrepreneurial activities, to the consolidation and amplification of entrepreneurial structures, to re-qualify and increase the professional competencies of the operators, to stimulate integration among tourism operators and the territory, to generate landscape and environmental sustainability (landscape planes, good practices, environmental certification of systems and products, manifestos of environmental quality, use of technology for energy conservation and for renewable energy etc.), to preserve and regenerate environmental, landscape, traditional and cultural resources.

As far as positioning is concerned, the area products should be characterised for their novelty/uniqueness, for the value and quality of the supply/advantages proposed, for the force of imagination and professionalism of the operators, for the ability to satisfy tourism demand keeping in mind in particular the possible criteria of accessibility for persons with physical disabilities or for the elderly segment and, finally, for the degree of feasibility (this last understood as the existence of entrepreneurial subjects, of economic and financial feasibility and of regulatory-urbanistic feasibility).

Figure1. The strategic model of the area product system



Source: The Strategic Model of the Area Products System presented during the 1st Forum 13 December 2002.

In synthesis, the Area Product was designed as a model to:

- **Promote and ensure** local development centred on goods and services in which the values and knowledge of the territory are expressed.
- **Attract** capital to invest stably in the territory.
- **Generate activities** through the stimulation of the creation, development and/or re-conversion of entrepreneurial activities directly (transportation services, systems for the environmental and cultural valorisation of the territory, hospitality and food service activities) or indirectly (suppliers of goods and services functional to the supply of the services of the area product) connected to the area product.
- **Attract** flows of tourists and excursionists according to the volumes, habits and consumption methods compatible with the objectives of tourism valorisation and conservation of the environment and culture of the territory.
- **Order the activities** to ensure a supply that is coherent and integrated with the available human and natural resources, with the need to safeguard the territory and with market demand (as a guarantee of the feasibility and sustainability of the area product).

The success, and more important the survival of the area products as planned, has been made to depend, nevertheless, on the ability of the subjects involved to elaborate and implement an action strategy based on: the dimensional stability of the reference area; the integration of the environmental, cultural, economic and social components; the capacity to optimise the added value of each component within the value chain of the territory; the definition of the principal activities of the population; the ability to attribute a homogenous, coherent and consequent set of attractive factors to form the so-called “localizing package”, that is, the product for sale.

A series of operational instruments are derived from such complex planning; these instruments form the propaedeutical basis for the fine tuning of the integrated

⁶ Definition presented during the 1st Forum of 13 December 2002.

Call intended to implement the tourism development model based on the area product concept. In particular:

- The selection of social, environmental, economic and positioning criteria to use for planning and validating the area products of the territory.
- An analysis of the territory (or “diagnostic outline”) which contained, ordered by each City, all of the territorial attractors and which was intended to constitute a useful reference for the verification of the validation of these through the executive planning of the area products of the territory.
- An analysis of the demand, a fundamental tool for the verification of the potential supply and/or supply to be developed.
- Identification of the criteria and methods of integration among the three main components (tourism, environment, culture) both on a level of the project/strategic set up and of the behavioural and organizational rules of the subjects involved, also keeping in mind the necessary synergies between public and private.
- The drawing up of general aspects of the area products containing their modelisation and the related components of the integration process as well as the definition both of the interventions indispensable for their realisation and of the organisational, managerial and context components necessary for the effective functionality of such products and for the possibility of their further development and enrichment.
- The enucleating of five reference macro-products with the related general matrixes of area product, in which the components existing or expressed in the territory were identified on a town level.
- The set of criteria for the selection of interventions and the drawing up of the related implementation plan containing both the temporal organisation (chronogram) and the identification, by the various interventions and/or categories of intervention, of the administrative procedures and related financial instruments necessary for their realisation, including, for any interventions that configure as aids to businesses, appropriate selection procedures open to the public.

The entire duration of the planning of the TAC supply chain can be, therefore, virtually broken down into two phases. The first, intended primarily for the selection of social, environmental and economic criteria and for the development of a set of information about the territory (diagnostic picture and of the externalities, territorial survey, supply and demand analysis) which have allowed the formulation of a preliminary proposal for a “Area product” pool, shared during the 1st Forum with the interested territorial stakeholders.

The second phase consisted in broad territorial “animation” activity – conducted through meetings and interviews with the territorial stakeholders – for the acquisition of proposals for thematic products. Following the previously mentioned methodological setup of “Agenda 21 Locale” this phase, dedicated to sharing with the territory, concluded with a second territorial Forum,

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during which all the results of the study conducted and of the proposals coming from the territory itself were presented and diffused. From the sharing of the first Area Product Pool (1st Forum) and from the elaboration of the territorial proposals emerging as a consequence of the animation, it was possible to verify, therefore, the level of awareness and maturity of the territory to be able to proceed with a subsequent and correlated “fine tuning” of five macro-products (aggregated formulas of the original thirteen PdAs presented during the 1st Forum). These are the products which – following the work of analysis and animation carried out – it was felt that the territory was more prepared to take into consideration (accept) thanks to the presence of elements already existing and/or otherwise already implementable in the various areas of the PIAT, identifying all the components (goods, services, regulation, etc.) typical of marketable products equipped with the necessary competitive specificity.

The identification of this selected nucleus of five PdA was, therefore, the result of a process having as fundamental stages the verification of the following elements:

- Consensus among the actors
 - Development sustainability
 - Legislative compatibility
 - Coherence with:
 - The overall integration philosophy of the PIAT;
 - The Regional Programme which refers to Measure 3.2 “Valorisation of natural and cultural resources (*Valorizzazione delle risorse naturali e culturali*)” as defined in the *Complemento di Programmazione del Docup Ob. 2 2000-2006*;
 - The dynamics of the tourism market, through comparison with an international *panel group* of Tour Operators.
- The pool of the PdA presupposed the realisation and application of individual agreement protocols among all of the actors – as regulation of a system in which quality is ensured – structured in:
- Regulation of the functioning of the product, access, management, etc.
 - Area product identification logo (as a declination of the umbrella mark with regional validity)
 - Definition of the requirements of the system, product and quality of the service/product dispensed
 - Creation of a system of control and guarantee of respect of the membership regulations and standards and of the functioning of the area product.

From this second phase of planning, therefore, a series of products emerged which acted as a synthesis of the thirteen preceding PdAs, presented at the 1st Forum:

1. THE PATHS OF UMBRIA (*SENTIERI D'UMBRIA*): a synthesis of all the occasions for active and environmental enjoyment of the territory.
2. THE FLAVOURS AND TRADES OF UMBRIA (*SAPORI E MESTIERI D'UMBRIA*): a synthesis of resources and of the services connected with food service, hospitality, crafts and typical farm food

- products in order to enhance, promote and characterize the territory.
3. STORIES OF UMBRIA (*STORIE D'UMBRIA*): recreation of the atmosphere of the past through places and events, material and immaterial, with proposals having as their nucleus the art, history, culture, spirituality and wellbeing, that can be found in the reference area.
 4. THE HOUSES OF UMBRIA (*CASE D'UMBRIA*): product-network characterised by forms of hospitality in structures with particular characteristics (buildings of historical importance or bearing witness to the historical-architectural tradition of the territory even with reference to rural culture).
 5. THE FARMS OF UMBRIA (*FATTORIE D'UMBRIA*): product-network of rural hospitality characterised by a philosophy of horizontal integrations (ties among the suppliers of the same type of service) but also functional to a vertical integration where characterized by themes/services dedicated to the other area products (for example, tasting points, equipment for bikers, small business museums, laboratories and in any case all those services which contribute to improving the quality of enjoyment of the territory).

Subsequently, ulterior territorial meetings were held on individual territories, with the participation of Sviluppumbria which was assigned the task of continuing the work of supporting the subjects interested in the elaboration of projects that could accede to the calls for regional funding.

And exactly under the Integrated Multi-measure TAC Call – which extended its range inside the regional territory – the PdA was structured in the form of networks; in consolidation of these networks the obligation to commit to constituting themselves in aggregated forms (for example temporary Business Groups - *Raggruppamenti Temporanei di Imprese*) was provided as an essential condition for the creation of the product and for taking part. At the same time adhesion to “quality protocols” was required, to be respected and maintained/strengthened over time, with various declensions according to the nature of the adhering business.

The Rules and regulations, included in the Call, also established, for each of the three types of area products provided for therein (and emerging as an ulterior synthesis of the five PdAs explained above), the related construction methods and characteristics of composition. In this regard art. 5 of the aforementioned Rules and regulations explicitly required that a PdA could only have access to funding if it possessed the following components:

- Central tangibles: interventions of a structural nature indispensable for the existence itself of the product
- Central intangibles: immaterial interventions which, besides characterising the area products, facilitated their effective enjoyment

- support tangibles: structures and other interventions of a material nature which, completing the product increased its degree of attraction but which, by themselves, would not have characterized the product itself
- support intangibles: actions in support of the material components of the area product and of the intangible ones considered essential for its enjoyment. The intangible support interventions had the function of completing the product, increasing its distinguishability and perception on the part of the demand

The PdAs which, as part of the aforementioned Call, starting from the planning process described above, were considered able to create integrated supply chain capable of improving the quality, functionality and tourism attractiveness of Umbria, coincide with the three fundamental areas of the regional resources/potential and are:

1. “Percorrere l’Umbria”, a synthesis of all the occasions of environmental use of the regional territory in its various specificities;
2. “Sapori e mestieri d’Umbria”, a synthesis of the resources and services connected with the typical food and wine, artisan and farm food activities in order to valorize, promote and characterize the regional territory in its various specificities;
3. “Storie d’Umbria”, a synthesis of the atmosphere of the past through places and events, with proposals having as their central nucleus the art, history, culture and spirituality of the regional territory in its various specificities.

The integrated projects indicated in the TAC Call, in coherence with what was established under the *Unità di Progetto Allargata*, were to mandatorily contain all the components of intervention or action, called central components – of different declination according to the PdA chosen– (art. 5 of the Rules and regulations), to which support components of greater qualification and reinforcement of the tourism supply pursued could be added.

Of the private components (hotel and other businesses) of the constituting PdA it was also required that they respect, as mentioned, the criteria and technical specifications indicated in the “Quality protocol” (art. 6 of the Rules and regulations), which represented the first level of constitutive rules of the PdA System. This quality protocol has constituted an important piece of the puzzle, in the framework of the definition of the PdA model, as a guarantee of its integration and promotion – coherently with the chosen thematic character – but also of its sustainability and of respect for territorial typicality. The quality protocols also had the important task of ensuring the dependability of the products and of reinforcing the ability to penetrate the market of the businesses that would have adhered to the PdA (art. 6 Rules and regulations).

The regional territory has assimilated the solicitations of the Call, in all 25 integrated projects were presented, 22 of which were admitted for funding.

As a whole the actions carried out can today be defined as a sort of incubator where the various projects expressed by the territory were developed, integrated with the territorial vocations and the market demand. The activities carried out in the various territorial contexts are indicative of a great potential, probably not yet organised and not yet sufficiently mature, in the sense of integration and of the capacity to propose itself as a competitive product on the market.

It is for this reason that the region of Umbria has confirmed its commitment to defining and supporting the process of implementing the area product model, also in combination with the planning currently present on an institutional level. We refer specifically, first of all to the "Integrated and collective projects and products (*Progetti e prodotti integrati e collettivi*)"⁷ which can be activated on "a regional or inter-regional scale by specific **Product Unions** in which businesses or businesses and public bodies participate"⁸ (art. 9 of the regional law nr. 18/2006) which seem to represent the new model of integration among tourism operators and others, public and private, to foster territorial tourism development. But above all we refer to the recent TAC 2 Call which has recuperated the concept of the area product, giving support to the promotion processes and instruments of those who had already formed following the preceding public notification and which wishes to give life to an ulterior form of integration through the stimulation of the creation of thematic products. From here on, the area products will be flanked therefore by **thematic products**, 10 in all, or tourism products on a regional scale which must necessarily provide for, to have access to the contribution, a stable organisation with the goal of systemising the individual components of the product and a strategic marketing plan aimed at the promotional-commercialisation of the tourism product supply. With these the region intends to address specific market segments and, principally to foster the qualitative growth of regional tourism supply and the promotion of this on the market.

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⁷ See DOCUMENTO TRIENNALE DI INDIRIZZO STRATEGICO 2008-2010, Legge Regionale 27 December 2006, nr. 18 - art. 5, Published in Bollettino Ufficiale Regione Umbria nr. 14 del 26 March 2008 - Supplemento straordinario n. 2

⁸ "scala regionale o interregionale da parte di specifiche Unioni di prodotto cui partecipano imprese o imprese e enti pubblici")