MEMBER STATES' ANNUAL TOURISM REPORTING TEMPLATE

Article 3 of Council Decision 86/664/EEC₁ of 22 December 1986 establishing a consultation and cooperation procedure in the field of tourism stipulates that:

"...each Member State shall send the Commission, once a year, a report on the most significant measures it has taken and, as far as possible, on measures it is considering taking in the provision of services for tourists which could have consequences for travellers from the other Member States. The Commission shall inform the other Member States thereof".

The following reporting form aims at facilitating compliance with this Council Decision.

SECTION 1 TOURISM ORGANISATION AND GOVERNANCE

This section is aimed at reporting on the following:

- **Administrative organisation**

- **Territorial organisation**

- **Organisation and links between the national tourism authority and the provinces / regions**

- **Organisation and links between the national tourism authority and industry associations, stakeholders and customers**

1.1. Please provide a **short description of the administrative and territorial organisation of public bodies responsible for tourism**, indicating the relationship and cooperation between national, regional and local bodies of the core responsibilities and competences of each department (Max. 3000 characters)

According to the Austrian Federal Constitution, the nine Länder (federal states) have the legislative and executive competencies for tourism affairs. Nevertheless, as tourism is a typical cross-cutting sector, both federal and European laws apply. There is a Parliamentary Committee for Tourism established within the Austrian Parliament. At the national level, tourism policy is the responsibility of the Federal Ministry of Science, Research and Economy ("the Ministry"). In 2010 the Minister launched a national tourism strategy with the objective of close and strategic co-ordination on tourism issues. In particular, this strengthens co-ordination between the national and regional levels, which are closely involved in the so-called Strategic Group. The *Länder* are also regularly consulted in another permanent working group for the European Union and international tourism activities (see below).

The Austrian National Tourist Office (ANTO or Österreich Werbung) is the country's

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1   http://eur-
         lex.europa.eu/Notice.do?val=123070%3Acs&lang=en&list=123070%3Acs%2C&pos=1&page=1&nbl=
         1&pgs=10&hwords=

national tourism marketing organisation. It is funded by the Ministry (75%) and the Austrian Federal Economic Chamber (25%). The ANTO co-operates closely with the Austrian tourism trade (e.g. tourist boards of the Länder, destinations and tourism businesses) for marketing services. The core competences of the ANTO are market research, brand management, innovative marketing, both domestic and international, and tourism networking and information brokering. In its international strategy, it focuses on increasing Austria's market share in the most promising international markets.

Links: www.austria.info b2c and http://www.austriatourism.com b2b.

1.2. Please provide an **organisation chart** reflecting the above described administrative and territorial organisation.
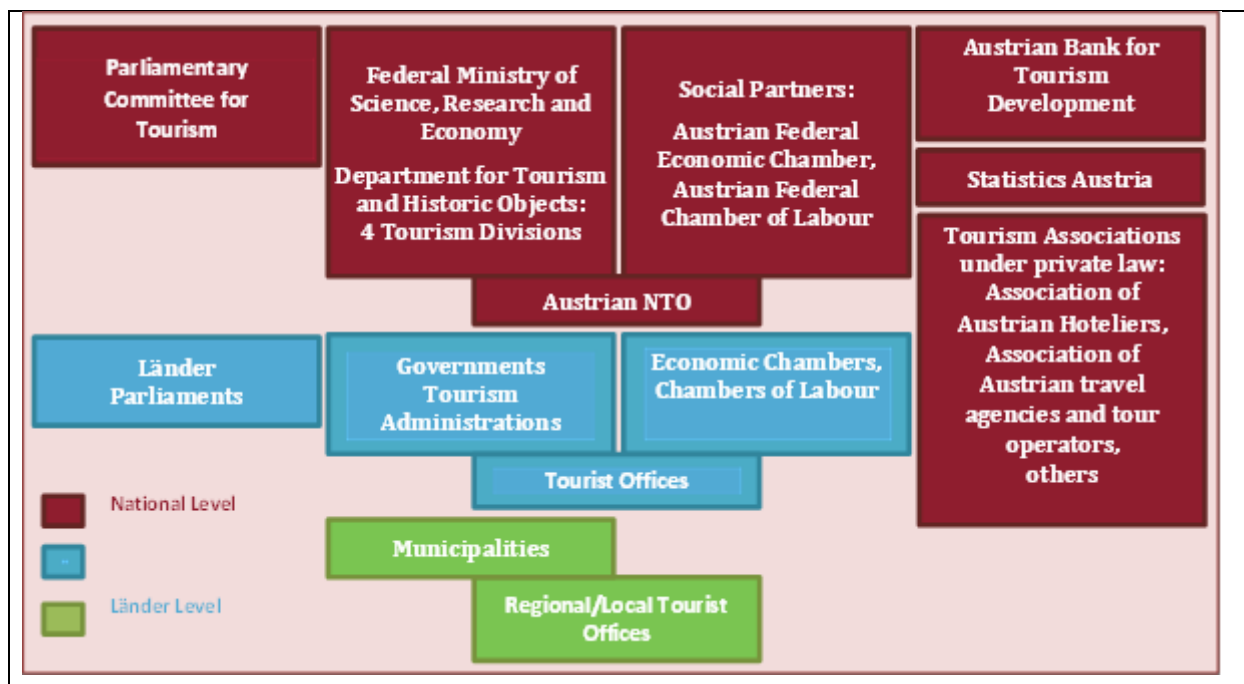
1.3. Please list and describe briefly the **relationship and main areas of cooperation between national/regional public tourism bodies and the most significant / active private organisations / stakeholders / industry associations /unions / consumer organisations**. (Max. 1500 characters)

Co-operation with other ministries, departments, institutions and the tourism industry is organised for specific topics either on the longer term via permanent working groups or round tables (e.g. sustainable mobility, labour market, visa, tourism ethics), or on a case-by-case basis (e.g. new funding schemes, new legislation affecting tourism).

The Ministry is cooperating
- with the Austrian Economic Chamber in financing and supervising ANTO
- with ANTO in tourism marketing activities
- with the Austrian Hotel and Tourism Bank (ÖHT) in funding tourism-related projects
- with all social partners (especially Austrian Economic Chamber and the Austrian Trade Union Federation) on questions of business related issues within the general tourism policy and horizontal issues of tourism development (e.g. in carrying out specific initiatives in tourism education and training, barrier-free activities, mobility issues)

- with the Austrian Ministry for Transport, Innovation and Technology and the Austrian Ministry of Agriculture, Forestry, Environment and Water Management in the field of sustainable tourism mobility
- …

Other significant stakeholders that are involved in cooperations are the tourism marketing organizations of the Länder, the Austrian Hotel Association (ÖHV) and the Austrian Tour Operators Association (ÖRV). Further stakeholders are consulted according to specific topics.

1.4. What is the existing national/regional specific legislation on tourism? (Max. 500 characters)

National level:
- Commercial law*
- Labour legislation: Working Time Act, Working Rest Act, Children and Youth Employment Act, Maternity Protection Act (Tourism is one of the few sectors for which numerous special arrangements exist within the legal protection regulations for employees)
- Internal security
- Fiscal system
- Partly: environmental laws
- Tourism funding*
- Tourism statistics*: National regulation on tourism statistics based on the EU directive
- International agreements of tourism-related matters*
* Responsibility: the Ministry
Links: The legal information system of the Republic of Austria (RIS) http://www.ris.bka.gv.at/ and
BMWFW http://www.bmwfw.gv.at/tourismus

Länder level:
- Tourism laws and regulations
- Partly: environmental laws and regulations
- Regional/spatial planning
- Infrastructural issues
- Tourism funding at the Länder level

SECTION 2 - MEMBER STATE ECONOMIC DATA AND TOURISM BUDGETS

This section is intended to provide an overview of the key statistical information about the general tourism economic environment of the Member States.

Data marked with **green** is also collected by Eurostat. Data marked with **orange** is equally collected by the OECD. The data categories match the templates of these two organisations, therefore data reported to the Commission can be transferred / used when reporting to Eurostat and OECD and vice-versa.

The statistical data provided in the tables below shall cover the year 2015 and, **if available**, 2016.

The data collected through these sections will also feed into the future Virtual Tourism Observatory.

Please use the Excel templates provided below in order to facilitate coherence and comparability of the data.

Please note that you are only requested to fill in data that is available in your country. Please insert "N/A" for those that you are not able to provide.

MS Annual reports_
simplified statistical an **SECTION 3 NATIONAL TOURISM POLICY AND STRATEGIES**

This section aims at collecting information on the Member States general strategic vision as well as the specific objectives of their tourism policies.

3.1. Please provide information in bullet points on the key mission, main medium and long-term **objectives and** the main targets **of your national tourism policy.** (Max. 1500 characters)

Apart from the national tourism strategy and its key elements (see below), the programme of work of the Austrian federal government sets main objectives with regard to the national tourism policy for the years 2013 to 2018. These are the following:

- Sufficient funding of ANTO and increased financing options due to a rededication of 50% of guarantees of the ÖHT should result in an increase in bednights from 131 Mio. in 2012 to 140 Mio. bednights in 2018.
- Travel and visa facilitation according to Schengen regulations.
- Special attention to rural areas: Attractive framework conditions that could encourage tourism-companies in rural areas; funding for research and development especially in fields that are beneficial for rural areas, e.g. tourism.

3.2. Do you have a multi-annual national tourism strategy specific / relevant for tourism in place? If yes, please describe in bullet points the main medium and long-term objectives of the strategy as well as **who is responsible for its implementation. How is the implementation monitored and how often?** (Max. 2000 characters)

In 2010 the Minister responsible for tourism launched a Tourism Strategy in close collaboration with the nine Länder and all relevant tourism stakeholders. A key element of the strategy is the focus on Austria's USPs, in particular with regard to marketing: the Alps, the Danube and lakes, cities and culture. Due to the success of these USPs they remain as well as the five key issues marketing, innovation, subsidies, infrastructure and business environment identified in 2010.

To respond to current challenges there is an additional focus on the following issues:

- Labour market: improving the image and competitiveness of jobs in the tourism sector.
- Financing: continuation of the strong public-private partnership with the Austrian Bank for Tourism Development, which handles SME funding programmes, assumption of liability and the provision of loans at reduced interest rates.

Development and implementation of new forms of financing (e.g. crowd investing) for tourism.

- Bureaucracy: decrease of administrative and regulatory burden to ensure a competitive business environment.
- Digitalisation: fair conditions in the online market, keeping up with and benefiting from digitalisation.
- Seasonality: strengthening year-round tourism.
- Internationalisation: new markets and target groups for holidays in Austria.
- Climate Change: year-round offers and sustainable mobility in tourism.

Monitoring: The tourism strategy is work in progress, is reviewed and adapted to international and national developments on a regular basis.

4. TOURISM CHALLENGES, MEASURES AND INITIATIVES

This section aims at collecting information on the challenges the Member states and the tourism industry has to deal with as well as the measures put in place to tackle them.

4.1. Please identify the key challenges for the tourism sector in your country and indicate their importance /priority in the table below.

CHALLENGES	IMPORTANCE / PRIORITY		
	HIGH	MEDIUM	LOW
Diversification of the tourism offer		x	
Protection of the cultural heritage		x	
Protection of the natural heritage		x	
ICT and innovation, digitalisation	x		
Collaborative economy in the tourism sector	x		
Connectivity and transport	x		
Employment in tourism – improving the perception of the sector as a career opportunity	x		
Improving education and skills in tourism		x	
Combatting seasonality	x		
Demographic changes	x		
Improving accessibility of tourism	x		
Improving socio-economic data in tourism		x	
Economic crisis and recovery		x	
Improving investment in the sector	x		
Improving the sustainability of tourism offer		x	
Combatting climate change		x	
Improving the quality of tourism offer	x		

Developing responsible tourism practices		x	
Competition against other destinations		x	
Administrative / regulatory burden, bureaucracy, improvement of the business environment	x		
Other, please specify			

4.2. **Please describe briefly the main measures in your country aimed at tackling the key high-priority challenges indicated above**. (Max. 2000 characters)

Investment, Quality and innovation: The Ministry continues the strong public-private partnership with the Austrian Bank for Tourism Development which handles SME funding programmes, assumption of liability and the provision of loans at reduced interest rates. The main objectives of these programmes are to encourage investment and innovation, to improve the quality and optimize the size of tourism enterprises and to encourage new business start-ups and cooperation. http://www.oeht.at/home/

Employment in tourism: In the Austrian national tourism strategy, employment is an issue of high importance. Education and training have been identified as crucial framework conditions for the success of Austrian tourism. Therefore, the Ministry together with its partners has launched a number of initiatives in order to increase the attractiveness of jobs in tourism and to satisfy the high demand for skilled employees. These initiatives include e.g., information packages for schools that help teachers to inform on training possibilities, information brochures and image-trailers that support apprentices in the application process and awards for companies (e.g. for initiatives in the field of employee development).

In March 2015, a decision on new apprenticeships was taken. These include the new apprenticeship "Hotel Kaufmann/-frau (Rezeptionist/in)" (hotel clerk, receptionist). The possibility of combining an apprenticeship with the exam that enables an university entrance has been made more attractive.

Connectivity and transport: In order to effectively deal with the challenges that the tourism sector is facing in terms of mobility (e.g. more short term trips, "use"- instead of "own"-mentality concerning cars, demographic changes, capacity restrictions especially in sensitive areas as the Alps), the Ministry has started within the Tourism Strategy several initiatives to improve the linkage between tourism and transport: conferences, workshops, publications (including a comprehensive study in 2013).

Together with the Austrian Ministry for Transport, Innovation and Technology and the Austrian Ministry of Agriculture, Forestry, Environment and Water Management activities are taken in order to sensitize the stakeholders of sustainable tourism mobility. Highlight is the annual Tourism-Mobility-Day - a networking conference - which was organized for the first time in 2014. It gives an overview of the needs and challenges of tourism mobility and the importance of cooperation between tourism, transport and environment in view to create mobility solutions to and also within the tourism destinations that are customer friendly, simple, affordable and sustainable. Furthermore, a "rail tour for tourist enterprises" was initiated in 2014 and is touring until 2017 in the Austrian Länder. Due to the high response of the activities, also a platform for sustainable mobility in tourism was started in 2015 in order to have a regular exchange with the stakeholders of tourism, transport and environment from the federal and the Länder-level. In May 2016 a manual was published showing the needed steps to offer more sustainable mobility in tourism destinations

Improving accessibility of tourism: A handbook that intends to inform the tourism enterprises about the legal framework (ending of the transition period with 31st December 2015) in regard to accessibility and respective construction standards has been published together with the tourism industry. With regard to demographic change and accessibility, together with the tourism industry the Ministry has also published brochures on the creation of natural and cultural offers as well as a brochure on customer treatment and technical information-leaflets on requirements according to standards.

Climate change and tourism: Climate change has an impact on travel patterns and needs of tourists in both the winter and the summer season and, subsequently, on the development of products and infrastructure at all levels (enterprise, regional, national and international). Coherently, the Ministry sets a number of measures: promotion of sustainable, year-round quality-tourism; research, knowledge transfer and awareness raising on climate change and tourism; promotion of energy efficiency (handbook "Energy efficiency measures for hotels and gastronomic businesses", published in 2015); promotion of sustainable mobility in tourism.

4.3. **Please identify if any of the above mentioned challenges relate to any legislative measures at EU level, and how.** (Max. 1000 characters)

Administrative/regulatory burden: There are increasing financial and administrative burden and costs for SMEs in tourism mainly due to legislative changes in consumer protection law (e.g. Package Travel Directive, Food labelling, accessibility requirements)

Connectivity and transport: Connecting Europe (Regulation No 1315/2013 on Union guidelines for the development of the trans-European transport network and repealing Decision No 661/2010/EU), increasing the connectivity within Austria and with neighbouring countries.

Climate change and tourism: Council Decision 2016/1841 of 5 October 2016 on the conclusion, on behalf of the European Union, of the Paris Agreement adopted under the United Nations Framework Convention on Climate Change.

4.4. **Please identify and describe any measures implemented in your country to increase tourism flows from other EU Member States and from third countries.** (Max. 1000 characters)

On behalf of the Ministry and the Austrian Economic Chambers, ANTO promotes Austria as a holiday destination in around 30 countries around the world. The nine Länder also maintain tourism-marketing organisations that are promoting the Länder as holiday destinations according to the objectives and priorities of the respective Land.

4.5. **Please describe how promotional measures implemented in your country make use of / capitalise on the promotional campaigns carried out by the Commission** (i.e. Ready for Europe, Europe. Wonder is all around, EDEN, low-season tourism campaigns, etc.). (Max. 1000 characters)

- ANTO is member of ETC.

- Austria has participated in the EDEN project from the first edition in 2007 until the edition of 2015. It has been implemented by the ANTO and the Ministry.

- Barrier-free travel has been well highlighted by the Austrian national tourism policy in the past years (Awards, Publications).

- Uptake of the stronger promotion of cycling tourism at EU-level in Austria: long-haul cycling trails and esp. EuroVelo routes have gained importance (e.g. acknowledging the positive effects of cycling tourism along the Danube, stronger focus on the implementation and promotion of other EuroVelo routes crossing Austria by regional bodies); cycling tourism supports the diversification of the tourism offer and combats seasonality as the season runs from April to October.

Austria participates in the European cultural routes program: new routes with Austrian involvement have been certified by the Council of Europe in 2014: Via Habsburg and Réseau Art Nouveau Network.

4.6. **Please identify and describe any measures /actions in your country which contribute to maximising the potential of national policies for developing tourism** (e.g. ensuring that tourism interests are taken into account in the development of other policies which may have impact on tourism). (Max.1000 characters)

See above (labour market, transport/mobility, regulatory environment, etc.). In addition: Setting up a coordinating body on visa issues between the respective ministries, the ANTO and the tourism industry.

4.7. **Please identify and describe any measures/actions in your country which contribute to maximising the potential of EU Financial Instruments for developing tourism** (e.g. information on main objectives, financing opportunities, training courses, etc.)**.** (Max. 1000 characters)

- European Agricultural Fund for Rural Development - EAFRD

Upon agreement with the Ministry of Agriculture, Environment, Water and Forest Management, which is the Managing Authority for implementing the rural development Policy 2014 - 2020 in Austria, the Ministry (Tourism Department) has been granted again the privilege and competence to use money from the Rural Development Fund in order to promote small-scale rural tourism projects (infrastructure investments and cooperation of small entrepreneurs) upon the condition to provide the necessary co-financing means.

- European Regional Development Fund ERDF

Again with regard to the new financing periode 2014 - 2020, Structural funds (ERDF) are used in Austria, to promote small-scale tourism investments on 2 axis: investment in growth and employment (cohesion) , and territorial cooperation (ETC). Since it is mostly the Länder

in charge of the respective co-managing of the various operational programmes, the Ministry cannot directly access funds. However, the Ministry provides some co-financing for tourism projects upon consultation.

Within the framework of both aforementioned EU funds, in the financing period 2007 - 2013 the Ministry supported in total 89 tourism projects providing grants (funds by EU+BMWFW) amounting to more than 15 million Euros.

4.8   Please describe shortly which EU programmes are used the most frequently and for what purposes of tourism development in your country. (Max. 1000 characters)

See 4.7.

Sustainable and responsible tourism, whether talking about economic, social or environmental sustainability, is a broad concept and may be interpreted in various ways depending on the attributes of a Member State or region.

The following questions focus on sustainability and responsibility in tourism as described in the 2007 Commission Communication2 on an agenda for sustainable and competitive European tourism.

4.9.   Sustainable destination: What support is given to strengthen destination management at the national /regional/local level (e.g. supportive policy environment, knowledge networks, training programmes, technological support tools, financial support, promotional activities, etc.)**?** (Max. 1000 characters)

- The Länder support several initiatives for destination management (e.g. sustainability and innovation workshops).

- Provision of information about ETIS (including a specific folder).

- ANTO: information brokering (expert knowledge on trends, markets, product development); a focus on "Nature reloaded" in 2016/2017; workshops for destinations.

Initiatives to raise awareness concerning the need for more cooperation between the tourism and the transport sector to provide sustainable mobility as well as with regard to adaptation to climate change (e.g. workshops for tourism destinations, information brochures - see above).

4.10.   Sustainable businesses: What support is given to strengthen the sustainability and competitiveness of tourism businesses (e.g. supportive policy environment, knowledge networks, orientation of business support services to sustainability, training, financial incentives, promotional activities, etc.)**?** (Max. 1000 characters)

See 4.2. in particular the strong public-private partnership with the Austrian Bank for Tourism Development

See most of the measures listed above (e.g. 4.7).

In addition:
For the past years sustainable tourism and the challenges of climate change have been a priority of the Ministry's tourism policy. In order to inform actors in the tourism industry about implications of climate change and possible response strategies, the Ministry supports awareness raising and information measures in co-operation with other important stakeholders (e.g. publication of best practices, contact points and subsidies for the tourism industry as regards clean energy, water, construction and mobility together with the Federal Ministry of Agriculture, Forestry, Environment and Water Management and other partners). Furthermore, the Ministry has supported the national research programme on climate change and its effects (StartClim, Link: www.austroclim.at/startclim) since the start of programme in 2002, commissioning several studies on the effects of climate change on the tourism sector. The Ministry has published the study "Impacts of Climate Change on Tourism in Austria 2030".

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2   http://ec.europa.eu/enterprise/sectors/tourism/documents/communications/commission-communication-2007/index_en.htm

http://www.bmwfw.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/HP-Version%20Klimawandel%20u.%20Tourismus%202030%20LF.pdf

In order to raise awareness of tourism-enterprises in regard to energy efficiency and to support them in their efforts of saving energy, a new and revised edition of the handbook "Energy efficiency measures for hotels and gastronomic businesses", has been published. http://www.bmwfw.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/Energieeffizienz_Leitfaden%20Online-Version.pdf

Handbook on accessible tourism (see above).

Sustainable Development Goals (SDGs): The Ministry developed a topical tourism specific online information illustrating the contribution of tourism to achieve the relevant SDGs. Good practices, expert information and information sources show possible ways of implementing the 17 goals in Austria.

https://www.bmwfw.gv.at/Tourismus/TourismuspolitischeThemen/Seiten/SDGs---Agenda-2030.aspx

4.11. Responsible tourism: What support is given to tourists and the tourism industry to promote their responsible practices and choices (e.g. awareness raising, sustainability in education, national marketing and media campaigns, promotion of certification schemes, etc.)**?** (Max. 1000 characters)

- see also 4.10. in particular the information on SDGs
- Austrian Eco-label by the Federal Ministry of Agriculture, Forestry, Environment and Water Management www.lebensministerium.at and http://www.umweltzeichen.at
- Sustainability is an issue in ANTO marketing campaigns and an integrated part of Austria's brand value as a tourism destination. However, there is no distinct target group marketing 'sustainability' as it is regarded more as a horizontal issue.
- The Ministry has already set up several initiatives in order to disseminate the UNWTO Code of Ethics, e.g. target-group specific brochures of the Code of Ethics for all stakeholders in tourism.
- Awareness raising campaign 'Dont look away' together with Switzerland, Germany and other European countries against the sexual exploitation of children in Tourism: All key partners of the countries are cooperating in the initiative (public and private sector, NGOs).

All studies and publications are available via http://www.bmwfw.gv.at/Tourismus/TourismusstudienUndPublikationen/Seiten/default.aspx

4.12. Please describe maximum three of the most significant planned / future tourism measures (legislative or non-legislative) which envisage to impact travellers visiting your country from other Member States or from outside Europe. (Max. 1000 characters)

Besides the well-established mature markets, Austria puts increasing focus on developing promising foreign markets in the Middle East and Asia Pacific (such as Arab Countries or China, South Corea, Japan, Taiwan and India). ANTO is working on suitable tourism offers and common marketing campaigns for these markets. Visa-issues are of high importance in this context, consequently Austria has opened numerous Visa Application Centers in the past few years in important foreign markets to facilitate travel to Austria (310 Visa Application

Points worldwide in 2014 compared to 95 in 2004).

5. ADDITIONAL INFORMATION

5.1. Please describe maximum 3 best practices of tourism measures implemented at national, regional or local level (any type of activity)**. (Max. 2000 characters)**

In 2014 the Austrian Bank for Tourism Development acting as financial intermediary has signed a contract with the EIB European Investment Bank. Based on this agreement the EIB will provide up to 250 mn EUR over the next years which will be used by the Austrian Tourism Bank to provide tourism SMEs for their investments with loans at reduced interest rates.

Innovation is of great importance for Austrian tourism, and it is also taken into account in the Austrian Tourism Strategy. One of the Ministry`s measures in this regard is the "Österreichische Innovationspreis Tourismus" (Austrian award for innovation in tourism), a bi-annual award organised in co-operation with the Länder, dedicated to innovative best practices, and with financial project support for the winner. The award is presented in two categories: enterprise level and innovative cooperations. In 2016, tourism projects that manage to innovatively stage water as a resource have been awarded with this prize.

5.2. Please describe, in a concise manner, in your view, what policy developments / actions / activities would you expect from the Commission's tourism team that would serve better (than the current ones) the EU Member States and the industry. (Max. 2000 characters)

- Follow-up horizontal issues: Better integration of tourism into the Commission's various policies: coordinate tourism issues concerned, with the aim of ensuring that the interests and needs of tourism are fully taken into account when formulating and implementing policies and legislation in particular with a view to support tourism projects and reduce regulatory and administrative burden.

- Create a knowledge base for tourism and a one-stop-shop for information; provide analysis of relevant EU-wide tourism issues.

THANK YOU