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# Transition Pathway for Tourism



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The actions presented in this document describe ambitions and desired objectives for transition. However, the realities of different territories have different starting points and possible limitations to the implementability of actions (e.g. considering islands, remote rural regions, densely populated urban environments). The objectives, actions and their follow-up should always consider the specificities of the territory.

### **EUROPEAN COMMISSION**

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Directorate G — Ecosystems II: Tourism & Proximity  
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## INTRODUCTION

On 10 March 2020, the Commission adopted a new industrial strategy. The aim was to help EU industry lead the green and digital transformations and to boost the EU's global competitiveness and open strategic autonomy.<sup>1</sup> In light of the experience of the COVID-19 pandemic, the update of the EU industrial strategy<sup>2</sup> highlighted the need to further accelerate the green and digital transitions and increase the resilience of the EU industrial ecosystems. To do so, the Commission proposed launching transition pathways that are co-created with stakeholders, as an essential collaborative process to help the transformation of industrial ecosystems. As the tourism ecosystem was the hardest hit by the pandemic and faces major challenges to achieve the twin transition, it was the first industrial ecosystem in which a co-creation process was launched to develop a transition pathway.

The aim of this report is to describe the measures and outputs needed to accelerate the green and digital transitions and improve the resilience of the tourism ecosystem. The objective is to encourage and invite all groups and stakeholders in the tourism ecosystem to engage and play their part in the initiative. The work to prepare the pathway has followed a collaborative approach involving all stakeholder groups. Similar active and productive collaboration should support also the way forward. Following the publication of this report, the Commission will invite tourism stakeholders to present their commitments to the transition pathway for tourism, and it will establish collaboration processes for the co-implementation and monitoring of the work. The follow-up of the transition pathway will be facilitated by an online stakeholder collaboration platform, which is to be established by end of 2022.

The transition pathway work also meets the request of the European Council in its conclusions of 27 May 2021<sup>3</sup> to invite “the Commission and Member States, in participation with relevant stakeholders, to design a European Agenda for Tourism 2030/2050”. The follow-up to the Member States initiatives and to the EU Agenda for Tourism will be supported by the Tourism Advisory Committee. The Commission will

also keep the Council informed of progress on co-implementing the tourism transition pathway through the Working Party on Tourism. The Industrial Forum oversees the transition pathways of all industrial ecosystems and will also be regularly updated on progress on the transition pathway for tourism.

### ***Co-creation process of the transition pathway for tourism***

The process to co-create the transition pathway for tourism was launched on 21 June 2021 with the publication of the staff working document SWD (2021) 164 final on potential scenarios for the transition. At the same time, the Commission published a targeted stakeholder consultation to collect input comments and contributions to the questions raised in the staff working document. The online survey elicited responses from almost 200 stakeholders from 24 EU Member States plus Norway and the UK<sup>4</sup>.

The responses to the stakeholder survey were analysed together with the scenarios from the staff working document and used to structure discussions in stakeholder workshops<sup>5</sup>. Meetings and workshops were held also with the Member States experts. All these meetings and workshops provided input into the co-creation process and into the concluding stakeholder consultation report<sup>6</sup>. The stakeholder consultation report provided the main components to prepare this policy report.

This report proposes the areas where stakeholders, often in collaboration, should take action, in order to accelerate the twin transition and promote more resilience in the tourism ecosystem. The measures are designed to yield positive effects for the stakeholders and to benefit the overall tourism ecosystem. It sets out several types of measures to be taken by different stakeholder groups, with specific milestones or a continuous improvement cycle. Readers can see the stakeholder consultation report for further information and options in the main areas set out in the transition pathway action topics. The overall co-creation process is summarised in Annex 2.

The Industrial Forum assists the Commission in tracking implementation of the March

<sup>1</sup> [European industrial strategy | European Commission \(europa.eu\)](https://european-council.europa.eu/media/49960/st08881-en21.pdf)

<sup>2</sup> [COM\(2021\) 350 final](https://european-council.europa.eu/media/49960/st08881-en21.pdf)

<sup>3</sup> <https://www.consilium.europa.eu/media/49960/st08881-en21.pdf>

<sup>4</sup> [Compilation of the responses of the targeted stakeholder consultation](#)

<sup>5</sup> [Workshop summary](#)

<sup>6</sup> [Stakeholder consultation report](#)

2020 industrial strategy and the May 2021 industrial strategy update. It therefore plays an important role in developing the transition pathways. A dedicated task force has been created inside the Forum to support the Commission in this co-creation process: Task Force 2 – Support for the development of transition pathways. The first deliverable of this task force is to develop a blueprint for all transition pathways. This deliverable has been developed in parallel with this report, and its final draft has been used as a reference when drafting this report. Annex 3 to the report provides an illustration of the building blocks used from the draft final blueprint to create the current document structure.

### **Tourism as an industrial ecosystem**

The EU’s tourism ecosystem is highly diverse and complex, covering globalised and interconnected value chains. According to non-official sources, in 2019, tourism generated 9.5% of total EU GDP and provided 22.6 million jobs in the EU<sup>7</sup>. Eurostat data shows that, in 2019, the ratio of international travel receipts relative to GDP was over 12% in some EU Member States (Croatia, Cyprus and Malta).<sup>8</sup> Out of 3.2 million tourism businesses, 99.8% were micro, or small and medium enterprises (SMEs)<sup>9</sup>.

The whole tourism ecosystem comprises businesses that work in several sectors, including food and beverage services, on-line information and services providers (tourist offices, digital platforms, travel technology providers), travel agents and tour operators, accommodation suppliers, destination managing organisations, attractions and passenger transport (for example, airlines and airports, trains, and cruises). In 2018, more than three out of four enterprises in tourism industries in the EU-27 operated in accommodation (14%) or food and beverage serving (61%) activities.<sup>10</sup>

Following the methodology presented in the Annual Single Market Report 2021<sup>11</sup>, the tourism ecosystem includes the economic activities listed in Table 1, as fully or partly belonging to it. The column “Share” in the Table 1 shows the percent with which the

specific NACE code activities are considered to belong under tourism ecosystem.

**Table 1: Tourism ecosystem definition by DG GROW Annual Single Market Report**

NACE (rev.2)	Description	Share
H49	Land transport and transport via pipeline	0.45
H50	Water transport	0.22
H51	Air transport	0.91
I	Accommodation and food service activities	1
N79	Travel agency, tour operator and other reservation service and related activities	1
N82	Office administrative, office support and other business support activities	1
R90- R92	Creative, arts and entertainment activities; libraries, archives, museums and other cultural activities; gambling and betting activities	0.66
R93	Sports activities and amusement and recreation activities	1

### **The impact of COVID-19 on tourism**

The tourism ecosystem was among the most severely affected ecosystems by COVID-19 crisis. In the spring of 2020, tens of thousands of consumers were affected by flight and package travel cancellations with cross-border consumer disputes in these areas increasing significantly<sup>12</sup>. In response, the Commission, assisted by the European Consumer Centre Network, developed tips and information on cancelled accommodations, car rentals and events booked as individual services<sup>13</sup>. They gave guidance to the Alternative Dispute Resolution bodies, which saw a surge in demand to help consumers and traders find amicable solutions out-of-court.

With a drop of some 70% in revenues in 2020<sup>14</sup> and up to 11 million jobs at risk in the

<sup>7</sup> [WTTC data from Travel & Tourism on Economic Impact](#)

<sup>8</sup> [Tourism statistics - Statistics Explained \(europa.eu\)](#)

<sup>9</sup> [Eurostat Structural Business Statistics](#)

<sup>10</sup> [Tourism industries - economic analysis - Statistics Explained \(europa.eu\)](#)

<sup>11</sup> [SWD\(2021\) 351 final Annual Single Market Report 2021](#)

<sup>12</sup> [ECC Net and Covid-19](#)

<sup>13</sup> [FAQ on cancellations of individually booked accommodations, car rental and events due to COVID-19](#)

<sup>14</sup> UNWTO (2020), ‘[World Tourism Barometer](#)’, Volume 18, Issue 6, October 2020,



EU<sup>15</sup>, tourism services started 2021 at the bottom of the business confidence indicator. However, tourism recovered significantly during the summer travel season, which usually represents one third of turnover for tourism businesses. The summer of 2021 was significantly better than 2020, but turnover was still below 2019 levels and saw a high share of last-minute bookings. The EU Digital COVID-19 Certificate (EU DCC)<sup>16</sup> contributed largely to this restart of tourism during the summer 2021.

As demonstrated in Figure 1, in 2021, the business confidence indicator for tourism momentarily recovered from the bottom position of all industrial ecosystems to the second highest by November 2021, even with the rise of the next wave of the pandemic in Europe. However, the emergence of the highly infectious SARS-CoV-2 Omicron variant forced many countries to bring back restrictions for hospitality and cultural sectors and increased testing requirements for cross-border travellers. The business confidence indicator for tourism ecosystem dropped again, returning to the level seen in May 2021. The key reason for this drop was worsening expectations of demand for tourism services.

These rapid fluctuations in the business confidence indicator confirm that tourism is very sensitive to the waves of the pandemic and related measures.

### ***Structure of this report***

As explained above, the structure of this report follows the blueprint developed by the Industrial Forum Task Force 2 on transition pathways. The blueprint, and this report, are based on a building block approach, where each building block covers a key aspect of the twin transition and the desired move to greater resilience. The task force identified seven such building blocks: sustainable competitiveness; regulation and public governance; R&I, techniques and technological solutions; infrastructure; skills; social dimension; investments and funding. The transition pathways should consider each of these building blocks from the perspectives of: the green transition (environmental sustainability and climate neutrality); the digital transition; the move to a greater resilience.

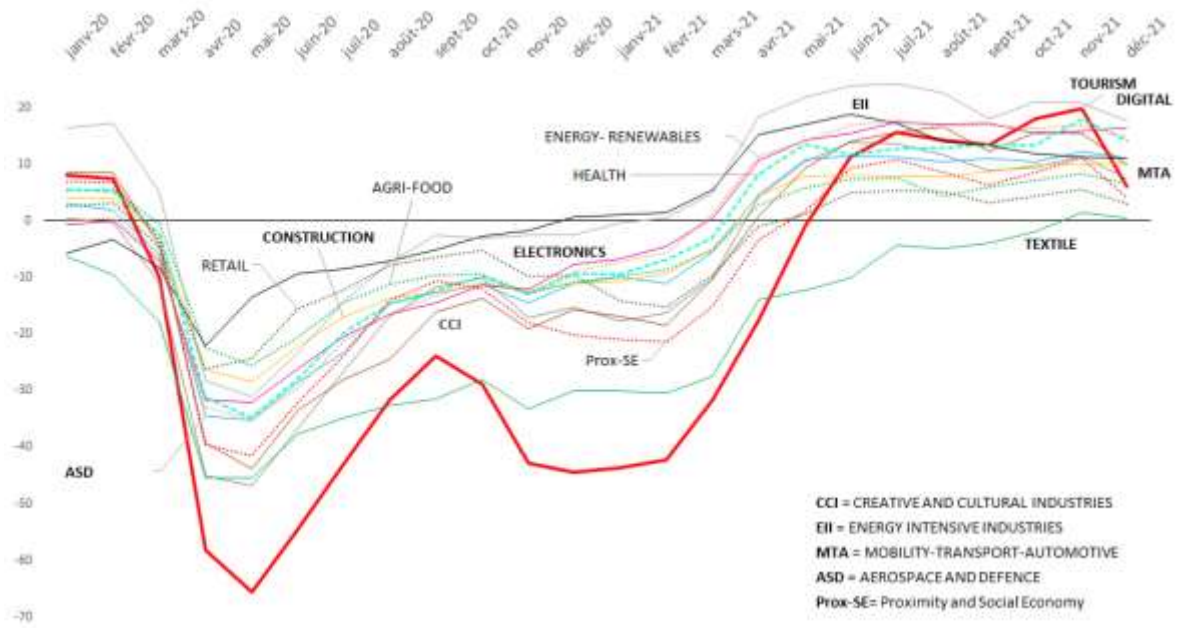
Annex 3 of this report illustrates how the building blocks of the blueprint are mapped

to the structure of this report. After the introduction, the report reviews the policy and governance frameworks and their revision needs from the perspective of tourism. The sections on green and digital transition and resilience cover several building blocks, and thereafter a section on funding and investments provides an overview on funding the twin transition and building long-term resilience. The final section of the report outlines the plans for supporting and monitoring the transition, by engaging stakeholders in an active co-implementation process and collaborative follow-up of the measures outlined in the transition pathway.

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<sup>15</sup> [Behavioural changes in tourism in times of Covid-19 - Publications Office of the EU \(europa.eu\)](#)

<sup>16</sup> [EU Digital COVID Certificate | European Commission \(europa.eu\)](#)



**Figure 1: Business confidence indicator of industrial ecosystems – tourism marked with red line (calculated by DG GROW.A1 based on data by the Joint Harmonised EU Programme of Business and Consumer surveys)**

## REGULATION AND PUBLIC GOVERNANCE

### *Regulatory drivers and barriers*

The increasingly digitised society and economy requires regulatory changes to ensure fair, safe and successful tourism services that meet demand in a sustainable manner. Input received from the stakeholder consultations recognised the need to support the twin transition and a resilient tourism ecosystem by considering changes to the legislative frameworks on several aspects.

### *Digital transition*

Access to data, both publicly and privately held, is increasingly important for tourism providers to take up innovative technologies and to develop resource efficient and innovative services. The EU Data Strategy<sup>17</sup> and establishment of data spaces supported by the DIGITAL Europe Programme<sup>18</sup> and the Data Governance Act<sup>19</sup> and Data Act<sup>20</sup> will create a framework for improved data sharing and re-use which will benefit the tourism sector

Online intermediation service platforms are increasingly prevalent in the tourism ecosystem. Following the rise of the platform economy, the Commission has proposed new rules for digital platforms. The Platform to Business Regulation<sup>21</sup> aims to improve fairness and transparency and means to resolve problems that may arise for the businesses offering services through digital platforms. The Digital Services Act<sup>22</sup> lays the groundwork for rules and regulations to protect consumers in their fundamental rights, to create a transparent and accountable framework for online platforms, and to foster innovation, competitiveness and growth in the single market. The Digital Markets Act<sup>23</sup> seeks to ensure a fair business environment for both large and smaller online platforms in digital markets. To improve the working conditions for people who find work via digital labour platforms (e.g. passenger transport and food delivery

platforms), the Commission has proposed<sup>24</sup> a set of measures including a directive on improving working conditions in platform work, adopted in December 2021<sup>25</sup>.

**Short-term rental services.** The SME strategy<sup>26</sup> announced that the Commission would look into developing a framework for short-term accommodation rental services, in order to strengthen EU tourism. The Commission published an online consultation on this initiative in September 2021<sup>27</sup>. The short-term rental (STR) initiative will improve transparency, and together with the Digital Services Act<sup>28</sup>, Digital Markets Act<sup>29</sup> and other relevant legislation it will support the regulatory environment in the tourism ecosystem. By improving the scope to monitor short-term rental service provision by hosts, a legislative initiative could help ensure transparency and improve market access of hosts. However, the initiative should avoid putting an excessive burden on SMEs that manage these rentals or provide online platforms.

#### Topic 1<sup>30</sup>: Fair measures for short-term rentals (STR)

- Strengthening the EU framework for short-term rentals to enhance transparency and improve market access
- Implementing STR policies which support balanced, fair and transparent short-term rental services

**Multimodal ticketing.** Digitalisation of the tourism ecosystem makes it increasingly easy to find and book journey tickets online. However, this is not easy if the door-to-door trip requires multimodal transport, for example combining air, train and local transport. To help travellers plan and buy trips combining different means of transport or involving different operators, the Commission announced in the sustainable and smart mobility strategy an initiative to

<sup>17</sup> [European data strategy | European Commission \(europa.eu\)](#)

<sup>18</sup> See [Digital Europe Programme](#), Work Programme 2021-2022, Preparatory actions for the data space for tourism ([DIGITAL-2021-PREFACTS-DS-01-TOURISM](#))

<sup>19</sup> [Data governance act | Shaping Europe's digital future \(europa.eu\)](#)

<sup>20</sup> [Data Act: Businesses and citizens in favour of a fair data economy | Shaping Europe's digital future \(europa.eu\)](#)

<sup>21</sup> [EUR-Lex - 32019R1150 - EN - EUR-Lex \(europa.eu\)](#)

<sup>22</sup> [The Digital Services Act package | Shaping Europe's digital future \(europa.eu\)](#)

<sup>23</sup> [The Digital Markets Act: ensuring fair and open digital markets | European Commission \(europa.eu\)](#)

<sup>24</sup> [Improving working conditions in platform work \(europa.eu\)](#)  
[COM\(2021\) 762 final](#)

<sup>25</sup> [COM\(2020\) 103 final](#)

<sup>26</sup> [COM\(2020\) 103 final](#)

<sup>27</sup> [Tourist services – short-term rental initiative \(europa.eu\)](#)

<sup>28</sup> [The Digital Services Act package | Shaping Europe's digital future \(europa.eu\)](#)

<sup>29</sup> [The Digital Markets Act: ensuring fair and open digital markets | European Commission \(europa.eu\)](#)

<sup>30</sup> The proposed actors and outputs of the actions under various topics are summarised in Annex 1.

overcome the market challenges involved in providing digital mobility services. The Commission published a public consultation on the initiative in December 2021<sup>31</sup>.

### Topic 2: Regulatory support for multimodal travelling

- Reinforcing the EU framework to facilitate multimodal journey planning and ticketing through digital services

### Green transition

The stakeholder consultations highlighted the links inherent in making tourism more environmentally friendly and in implementing several ongoing legislative initiatives relating to environmental protection and climate neutrality.

On 14 July 2021, the Commission adopted a series of legislative proposals<sup>32</sup>, entitled the "Fit for 55 package"<sup>33</sup>, setting out how it intends to achieve climate neutrality in the EU by 2050, and to reduce greenhouse gas emissions by at least 55% by 2030, compared with 1990. The package proposes to revise most of the EU climate and energy legislation, including the EU Emissions Trading System, the Effort Sharing Regulation, renewable energy and energy efficiency, transport and land use legislation. It sets out in practical terms the ways in which the Commission intends to reach the EU climate targets under the European Green Deal, under the "do no significant harm" principle<sup>34</sup>. The negotiations and decisions of the co-legislators on these legislative proposals will have a major impact on the green transition of tourism services and activities.

On 14 December 2021, the Commission also adopted a proposal for a Council Recommendation on ensuring a fair transition towards climate neutrality, to provide guidance to Member States on the design, implementation and evaluation of accompanying policies that are necessary to

exploit the job creation potential of the green transition to the full while mitigating potential adverse effects<sup>35</sup>. This proposal includes references to transition pathways and to the role and involvement of social partners in their design and implementation.

The green transition for public and private-sector tourism organisations will be spearheaded by the following legislative initiatives<sup>36</sup>:

- proposing binding EU nature restoration targets<sup>37</sup> as announced in the EU biodiversity strategy for 2030<sup>38</sup>;
- proposing binding targets to reduce food waste across the EU<sup>39</sup> as announced in the farm to fork strategy<sup>40</sup>;
- implementing Directive (EU) 2019/904<sup>41</sup> on single use plastics, making all plastic packaging reusable or recyclable by 2030, proposing measures to restrict intentionally added micro plastics and unintentional release of micro plastics as called for in the circular economy action plan<sup>42</sup>;
- meeting the objectives of the Urban Waste Water Treatment directive<sup>43</sup> as regards collection and treatment, taking into account the ongoing revision of the directive;
- Proposing harmonised rules on the uptake and supply of sustainable aviation fuels<sup>44</sup>;
- proposing rules for the use of renewable and low-carbon fuels in maritime transport<sup>45</sup>;
- boosting a smart and sustainable TEN-T network with long-distance, night and cross-border passenger rail services<sup>46</sup>;
- revising the Energy Performance of Buildings Directive<sup>47</sup> to require all new buildings to be zero-emission as of 2030, and new public buildings as of 2027;

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<sup>31</sup> [Commission seeks views on new initiative to facilitate journey planning and ticketing \(europa.eu\)](#)

<sup>32</sup> [Delivering the European Green Deal \(europa.eu\)](#)

<sup>33</sup> [COM\(2021\) 550 final](#)

<sup>34</sup> [Do no significant harm.](#)

[Technical guidance by the commission.pdf \(europa.eu\)](#)

<sup>35</sup> [COM\(2021\) 801 final](#) and [SWD\(2021\) 452 final](#).

<sup>36</sup> This is not an exhaustive list

<sup>37</sup> [EU nature restoration targets \(europa.eu\)](#)

<sup>38</sup> [Biodiversity strategy for 2030 \(europa.eu\)](#)

<sup>39</sup> [Food waste measurement \(europa.eu\)](#)

<sup>40</sup> [Farm to Fork Strategy \(europa.eu\)](#)

<sup>41</sup> [Directive \(EU\) 2019/904](#) on the reduction of the impact of certain plastic products on the environment

<sup>42</sup> [COM\(2020\) 98 final](#)

<sup>43</sup> [Council Directive 91/271/EEC](#) concerning urban waste-water treatment

<sup>44</sup> [COM\(2021\) 561 final 2021/0205\(COD\)](#)

<sup>45</sup> [COM/2021/562 final](#)

<sup>46</sup> [Efficient and Green Mobility \(europa.eu\)](#)

<sup>47</sup> [COM\(2021\) 802 final](#)

- amending the Renewable Energy Directive to increase the current target of 32% to 40% of renewable energy sources in the EU's overall mix by 2030<sup>48</sup>;
- revising the Energy Efficiency Directive<sup>49</sup> to nearly double the annual energy savings obligations for EU countries from 2024 to 2030;
- revising the Regulation (EU) 2019/631 on CO2 emission performance standards for passenger cars and vans<sup>50</sup>.

## Resilience

The COVID-19 crisis has revealed vulnerabilities in the current regulatory framework in terms of responding to unexpected events that result in mass cancellations of services booked by passengers and package travellers. Vulnerabilities were also revealed in the ability to adapt to additional requirements on the ground of public health (e.g. checking test results, various certificates), which challenged the "seamless travel", which was previously considered a given in the EU. Other regulatory needs relate to the tools available to monitor the ecosystem and its progress towards the twin transition and long-term resilience.

The Package Travel Directive<sup>51</sup> (Directive (EU) 2015/2302) and the passenger rights Regulations<sup>52</sup> play a key role in giving travellers legal protection. During the COVID-19 pandemic, however, a considerable number of passengers and package travellers whose travel arrangements were cancelled, did not receive timely reimbursements in accordance with these rules. This reflected liquidity problems faced by many businesses in the travel sector, and problems where different businesses were involved in the payment and refund chains.<sup>53</sup> For example, package travel organisers were obliged to refund pre-payments irrespective of whether they still held the money or had received refunds from service providers, for instance, an airline. Conversely, some passengers did not receive a reimbursement of their ticket from the (online) travel agent, even though

carriers had already paid the amount to the latter.

As part of the sustainable and smart mobility strategy<sup>54</sup> and the new consumer agenda<sup>55</sup>, the Commission will review the passenger rights and package travel regulatory framework, to ensure its resilience to extensive travel disruptions and to improve its consistency. The Commission will also assess options for adequate protection of passengers and package travellers against the risk of a liquidity crisis. The Commission will also assess options for the protection of passengers against the insolvency of carriers and for clarifying the insolvency protection for package travellers regarding the reimbursement of pre-payments.

Regarding airlines and airports, the Commission has adopted slot relief rules, currently extended until over summer season 2022<sup>56</sup>, to accommodate temporarily lower air traffic at the airports. Instead of the normal requirement to use at least 80% of a given slot series, airlines will only have to use 64% to retain historic rights in those slots during the ongoing COVID-19 pandemic.

In December 2021, the Commission proposed<sup>57</sup> to adopt new rules to make the Schengen area without internal border controls more resilient and fit for future crises. The update seeks to ensure that reintroduction of internal border controls by Member States remains a measure of last resort. The new rules also introduce common tools to manage the external borders more efficiently in case of a public health crisis, building on the lessons learnt from the COVID-19 pandemic and thus ensuring improved governance of the Union's external and internal border, thereby offering additional predictability to both the tourism sector and to travellers.

Tourism Statistics Regulation 692/2011<sup>58</sup> describes how Member States should contribute to harmonised data collection on tourism. Discussions with stakeholders highlighted strongly that there is a need to improve coverage of tourism statistics from basic statistics on trips and overnight stays to data on the social, environmental and economic impacts of tourism. This will most

<sup>48</sup> [Commission presents Renewable Energy Directive revision | European Commission \(europa.eu\)](#)

<sup>49</sup> [COM\(2021\) 558 final](#)

<sup>50</sup> [COM\(2021\) 556 final](#)

<sup>51</sup> [Package travel directive | European Commission \(europa.eu\)](#)

<sup>52</sup> [Regulation \(EC\) No 261/2004](#) establishing common rules on compensation and assistance to passengers in the event of denied boarding and of cancellation or long delay of flights

<sup>53</sup> [COM\(2021\) 90 final](#)

<sup>54</sup> [COM\(2020\) 789 final](#)

<sup>55</sup> [COM/2020/696 final](#)

<sup>56</sup> [Aviation: slot relief rules for airlines extended \(europa.eu\)](#)

<sup>57</sup> [COM/2021/891 final](#)

<sup>58</sup> [Regulation \(EU\) No 692/2011](#) concerning European statistics on tourism

likely require revising the legal basis for harmonised data collection, for example integrating ongoing work by Eurostat and the Member States to develop Tourism Satellite Accounts<sup>59</sup>, innovative approaches to statistical data sources<sup>60</sup>, continuing to following international tourism statistics approaches<sup>61</sup> and developing specific indicators to measure the green, digital and socio-economic aspects of tourism. Such indicators are being developed under the initiative of the EU Tourism Dashboard, as requested by the Council in May 2021<sup>62</sup>. Eurostat and national statistical authorities have launched discussions on revising the tourism statistics regulation in their yearly tourism statistics working group in November 2021

### Topic 3: Improving statistics and indicators for tourism

- Revising harmonised data collection rules on tourism statistics to include elements on economic, social and environmental sustainability
- Improving access to data for producing official statistics
- Including key sustainability indicators on destination level to the harmonised tourism data collection framework
- Implementing the EU Tourism Dashboard to support follow-up of environmental, digital and socio-economic aspects of tourism on EU, national and regional levels

### **Smart and sustainable tourism strategies**

Stakeholders confirmed that the green and digital transition to achieve greater resilience in tourism at national and regional levels should be guided by comprehensive tourism strategies. These strategies should be built on sustainable development principles, which factor in economic, environmental and social sustainability. It also requires effective

and collaborative governance that takes into account inputs from and the views of all stakeholder groups. Tourism strategies should pay close attention to:

- implementing the above regulations (in terms of their environmental objectives, digitalisation, data collection and monitoring);
- tackling the specific challenges of tourism destinations (climate mitigation and adaptation needs<sup>63</sup>, infrastructure needed to improve sustainability, pressures on biodiversity, water resources or pollution);
- specific strengths of tourist destinations in terms of natural resources, cultural heritage and the potential to give customers unique and authentic experiences;
- Inclusiveness and accessibility, including for persons with disabilities;
- Supporting SMEs and cultural and creative industries in their key role in the tourism ecosystem, in terms of technical assistance and the funding needed to meet the objectives of the strategy.

Depending on the tourism management set-up in the Member States and regions, the bodies in charge of developing tourism strategies may be national, regional or local level bodies. In cross-border areas, such as in coastal communities, it could be beneficial to develop a comprehensive strategy at a sea basin or at a macro-regional level, aligned with the existing initiatives, which would support the coordination and collaboration of stakeholders across borders. It could be appropriate for EU regions such as the outermost regions<sup>64</sup> to develop such cooperation for sustainable tourism strategies together with third countries and territories in their direct geographic proximity. Smart specialisation strategies<sup>65</sup> can also be helpful in developing smart and sustainable tourism.

The discussions in the informal ministerial meeting of 16 November 2021<sup>66</sup>

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<sup>59</sup> [Tourism Satellite Accounts in Europe — 2019 edition - Products Statistical reports - Eurostat \(europa.eu\)](#)

<sup>60</sup> Eurostat (2017). [Tourism statistics: early adopters of big data?](#)

<sup>61</sup> [UNWTO Statistics - UN System | UNWTO](#)  
<sup>62</sup> <https://www.consilium.europa.eu/media/49960/st08881-en21.pdf>

<sup>63</sup> For climate adaptation actions in the tourism sector, see section 2.7 in: [Study on adaptation modelling : comprehensive desk review : climate adaptation models and tools](#)

<sup>64</sup> EU outermost regions as defined in article 349 TFEU are nine EU regions located in the Atlantic Ocean, Indian Ocean, Caribbean and Latin America. The TFEU provides for tailor-made EU measures to support these regions.

<sup>65</sup> [Home - Smart Specialisation Platform \(europa.eu\)](#)

<sup>66</sup> [Informal meeting of tourism ministers and the 20th European Tourism Forum - Slovenian Presidency of the Council of the EU 2021 \(europa.eu\)](#)

demonstrated that many Member States have already developed or are in process of developing new tourism strategies that cover the types or actions and objectives discussed during the transition pathway stakeholder consultation process. Such examples can provide good practices for other countries and regions to draw on when developing or updating their specific strategies.

#### Topic 4: Comprehensive tourism strategies development or update

- Developing comprehensive national or regional strategies taking account of economic, environmental and social sustainability of tourism
- Guidance and best practice exchange for strategy development on national, regional and local level

inclusive governance approach, where destination management organizations take on strategic tasks, and the local community and authorities are involved in the decision-making process. These are good example practices for other destination management organisations to follow across the EU.

#### Topic 5: Collaborative governance of tourist destinations

- Establishing collaborative and data-supported destination management models
- Providing awards for smart destination management (Smart Tourism Capitals)
- Studying and sharing best practice on destination management

### ***Collaborative governance of tourist destinations***

To make these national or regional tourism strategies specific and usable, they need to be complemented with locally developed and adapted work plans. Depending on the local destination, the responsibility for developing or managing work plan may lie with the local authority or destination management organisation (DMO). As the skills and resources of both are needed to support tourism stakeholders in their work, the best solution would be to ensure that they jointly prepare and follow up the local tourism strategy and work plan.

The stakeholder consultation highlighted that collaboration between all stakeholders is important to ensure sustainable tourism that generates positive net effects for the visited communities around the tourism destination. This should include public and private-sector organisations, local producers and services, cultural and creative sectors and industries, local authorities, tourism management organisations and local associations and residents. Visitors should also be able to provide their input, which could help improve the visitor experience while factoring in the needs and interests of the visited community. This collaborative work should support local public spaces and services, tourism marketing and services design, and monitoring mechanisms of the impact of tourism locally.

Some of the best practices collected in the European Capital of Smart Tourism competitions take the collaborative and

## GREEN AND DIGITAL TRANSITION

### *Synergies with other ecosystems*

Links between other industrial ecosystems can both contribute to and hinder the twin transition and the resilience of the tourism ecosystem.<sup>67</sup> The cross-cutting nature of tourism should be recognised by taking a 'whole-of-government' approach that requires coordination between the local, regional, national and EU levels. Stakeholders identified several areas for action under the twin transitions where there are links with the objectives and actions in related industrial ecosystems and that support the competitiveness of the EU's tourism ecosystem.

The following ecosystems have a direct impact on the tourism ecosystem capacity to get greener, more digital and more resilient:

- 'Aerospace' for space data based services and applications, for fostering the sustainability, greening and the digitalisation for the tourist sector (e.g. Tools to monitor tourism flows, to sustainable mobility, or forecast and manage extreme weather events).
- 'Agri-food', for improving food systems and services, reliable local supply chains and reduced food waste for hospitality.
- 'Construction' for building and renovating more sustainable and resilient tourism infrastructures
- 'Cultural and creative industries' for developing innovative tourism based on cultural heritage, traditions, arts and authentic cultural experiences.
- 'Digital industries' for developing digitalised processes, use of AI and new technologies, empower consumers' sustainable choices and data-based innovative tourism services.

- 'Health' for ensuring access to healthcare when travelling outside of one's permanent residence.
- 'Mobility, transport and automotive', for developing sustainable mobility for travellers and visitors (reducing emissions of aircrafts, cruise ships, ferries, coaches, rental cars, etc.).
- 'Proximity, Social economy and Civil security' for platform-based services, e.g. for providing local transportation, food, and cultural and active tourism experiences for visitors (and residents).
- 'Retail' for providing more sustainable and quality shopping opportunities for visitors (and residents) and contributing to the livelihood and attractiveness of tourist areas

### *Meeting the demand for more sustainable tourism*

The competitiveness of the EU tourism industry will largely depend on its capacity to meet the need and customer demand to become more sustainable. A Eurobarometer survey from October 2021<sup>68</sup> indicated that 82% of Europeans are willing to change their travel habits for more sustainable practices, including consuming locally sourced products, reducing waste and water consumption, travelling off-season or to less visited destinations and choosing transport options based on their ecological impact. Their key interests in selecting destinations are nature (41%) and culture (42%), and a third would be ready to pay more to support local nature and local communities. Other surveys also show that 65% of travellers would be interested in engaging with authentic experiences related to local culture<sup>69</sup> (social sustainability).

Several policy strategies highlight the objectives of the European green deal<sup>70</sup>, which also should be followed by the tourism ecosystem. These strategies provide key transition targets for tourism and are reflected in the expectations of sustainability-conscious customers. Key strategies and their related targets include:

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<sup>67</sup> The tourism ecosystem has a direct impact on the health of several other ecosystems and vice versa (e.g. the impact of hospitality industry's closure on the 'Agri-food' ecosystem; the impact of travel restrictions on aircraft manufacturers). See Table 1 for economic sectors shared with other ecosystems.

<sup>68</sup> [Attitudes of Europeans towards tourism - November 2021 - Eurobarometer survey \(europa.eu\)](#)

<sup>69</sup> Booking.com (2021). [Sustainable Travel report.](#)

<sup>70</sup> [A European Green Deal | European Commission \(europa.eu\)](#)



- Passenger transport companies (aviation<sup>71</sup>, water and land transport) should reduce greenhouse gases (GHG) in line with the European climate law<sup>72</sup> goals to become climate neutral by 2050<sup>73</sup>
- Cities and regions should develop sustainable mobility for climate-neutral cities, thanks also to the use of EU space data and applications, with sustainable mobility plans and by doubling the high-speed rail traffic by 2030, following the sustainable and smart mobility strategy<sup>74</sup> and the EU mission 'Climate Neutral and Smart Cities'<sup>75</sup>.
- Buildings have to become more energy and resource efficient, and energy support must move towards sustainable renewables, following the renovation wave strategy and its action plan<sup>76</sup>.
- Hospitality and all tourism services should work towards circular models and reduce their environmental footprint, in line with the circular economy action plan<sup>77</sup> and zero pollution action plan<sup>78</sup>. This includes halving the amount of residual (non-recycled) waste by 2030 and reducing food waste, single-use plastics, air pollutants, and water pollution while increasing water efficiency.
- Water efficiency needs to be improved by and by promoting the wider use of drought management plans as well as sustainable soil management and land-use, in line with the climate adaptation strategy<sup>79</sup>.
- Consumers' choices must be empowered, through more transparent information about the sustainability and environmental footprints of the destinations/tourism services, in line with the circular economy action plan.
- Coastal and maritime tourism actors should develop sustainable tourism in line with the new approach for the sustainable blue economy in the EU<sup>80</sup>, European strategy for more growth and jobs in coastal and maritime tourism<sup>81</sup>,

and the EU mission on 'Restore our Ocean and Waters by 2030'.<sup>82</sup>

Specific challenges in the tourism ecosystem relate to the targets to reduce disposable materials and waste, and improve water use efficiency and sanitation, while ensuring the health and safety of visitors.

#### Topic 6: Sustainable mobility

- Passenger transport companies to develop greenhouse gas (GHG) reduction plans in line with the Climate Law goals
- Including the visitor perspective in sustainable mobility plans of cities and regions, even in smaller destinations
- Improving the appeal of railways for visitors

#### Topic 7: Circularity of tourism services

- Developing the use of locally supplied ingredients with low environmental footprint to reduce the environmental impact of food services
- Reducing food waste in the hospitality industry
- Reducing and separating overall waste of tourism services
- Increasing water efficiency, reducing water stress and pollution, and improving sanitation

In the tourism ecosystem, action to meet these targets should be supported at both national and regional levels, and can be encouraged through the uptake of existing EU tools. Tourism companies including SMEs, can sign up to the EU Eco-Management and Audit Scheme (EMAS)<sup>83</sup> to evaluate, report, and improve their environmental

<sup>71</sup> European aviation sector supports reducing the aviation CO2 emissions and making flying more sustainable through the [Destination 2050](#) commitments

<sup>72</sup> [European Climate Law \(europa.eu\)](#)

<sup>73</sup> [Delivering the European Green Deal \(europa.eu\)](#)

<sup>74</sup> [Mobility Strategy \(europa.eu\)](#)

<sup>75</sup> [EU Mission: Climate-Neutral and Smart Cities | European Commission \(europa.eu\)](#)

<sup>76</sup> [COM\(2020\) 662 final](#), [SWD\(2020\) 550 final](#)

<sup>77</sup> [Circular economy action plan \(europa.eu\)](#)

<sup>78</sup> [Zero pollution action plan \(europa.eu\)](#)

<sup>79</sup> [COM\(2021\) 82 final](#)

<sup>80</sup> [Sustainable blue economy \(europa.eu\)](#)

<sup>81</sup> [COM\(2014\) 86 final](#)

<sup>82</sup> [EU Mission: Restore our Ocean and Waters | European Commission \(europa.eu\)](#)

<sup>83</sup> <https://ec.europa.eu/environment/emas/pdf/other/EMAS-casestudy-tourism-V3.pdf>

performance in a systematic and transparent way. Tourist accommodations, including SMEs can apply for the EU Ecolabel<sup>84</sup>, the European Union label of environmental excellence or another EN ISO 14024 type I ecolabel or equivalent voluntary labels, which are independent, multi-criteria based and third-party verified.

Tourism operators should also foster the use of EU green public procurement criteria<sup>85</sup>, which covers food services, road transport and public spaces. Further development of such criteria could extend the public procurement support for green practices. However, SMEs will need to build up capacity and be supported through technical assistance, best practice guidance and funding to meet these demands.

### Topic 8: Green transition of tourism companies and SMEs

- Tourism companies, including SMEs, to register to EMAS
- Tourism accommodations, including SMEs to apply for the EU Ecolabel or other EN ISO 14024 type I ecolabels or equivalent voluntary labels, which are independent, multi-criteria based and third party verified
- Tourism operators to use relevant EU Green public procurement (GPP) criteria where applicable
- Capacity-building programmes, technical and financial assistance for SMEs to engage in environmentally friendly practices and schemes

## Digitalisation of tourism services

Digitalisation of the economy and of society in a broader sense, and the increased scope for data generation, collection and services will provide opportunities to transform tourism services. They can shift their business to provide more sustainable and innovative services that provide long-lasting and technologically enriched personalised experiences. Data (including space data) sharing between the public and the private

sector can help create innovative tourism services that support sustainability (e.g. tourism mobility and transport), manage tourism flows based on real-time data (e.g. crowd management at attractions), stimulate tourism demand and match supply more effectively (e.g. over-tourism) or services that generate data and statistics to feed into policy and decision making.

A key factor to boost competitiveness and innovation in tourism services is making better and innovative use of data. Currently, tourism bookings and search-related data are mostly controlled by multi-national platforms, giving no or limited access to the businesses that provide these tourism services (nor for public authorities). These businesses could use this data to anticipate demand for their services, analyse customer profiles and business trends, and ultimately provide a better customer experience.

Creating public-private partnerships could be important in facilitating new types of data sharing agreements and creating new platforms. Sharing data between private actors and public authorities can support better decision making<sup>86</sup> and stakeholders have proposed that better public-private data sharing could also considerably enhance the competitiveness and resilience of destinations and the tourism SMEs in the area. This requires creating data sharing practices and agreement models that comply with the necessary privacy rules and respect the legitimate commercial interests of each partner. These practices need to be aligned with the upcoming Data Act<sup>87</sup>.

From technological point, it is also possible to create services and platforms in which ownership is shared and not in the hands of a few. Actions are necessary to develop and enhance tourism service initiatives in which the data is community owned, like in case of platform cooperatives.

### Topic 9: Data-driven tourism services

- Stakeholder cooperation to agree on common practices (Code of Conduct) and to actively share tourism-related data in a European data space for tourism

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<sup>84</sup> [Currently EU Ecolabel criteria are available for tourist accommodations only. In the course of the next revision of the EU Ecolabel criteria, the possibility to expand the scope of these criteria to include other tourism services will be assessed.](#)

<sup>85</sup> [EU criteria - GPP - Environment - European Commission \(europa.eu\)](#)

<sup>86</sup> See for example the [agreement between platforms and Eurostat on sharing data on short-stay accommodation](#)

<sup>87</sup> [Data Act: Businesses and citizens in favour of a fair data economy | Shaping Europe's digital future \(europa.eu\)](#)

- Increasing use of data sharing in developing personalised tourism services and destination management, monitoring and service provision, including the creation of new platforms among SMEs
- Use of artificial intelligence and data-based innovation, such as local digital twins for predictive planning to accurately meet demand and increase resource efficiency of services

Overall, the digital transition should also help make information on the sustainable tourism offer in the EU more visible and known online. Eurobarometer survey 499<sup>88</sup> showed that digital information sources play an important role in helping people make travel and tourism decisions. However, over one third of Eurobarometer respondents stated that they find it difficult to find trustworthy information on the sustainability of the tourism offer. To support sustainable tourism and help meet rising demand effectively, it is important to improve the online availability of trustworthy information, also by agreeing validation mechanisms and elements of key information to be published.

Information on consumer rights when travelling within and across borders in the EU can increase the confidence of tourists. The European Consumer Centre provides advice and assistance in this area, working predominantly in tourist-related sectors such as air passenger transport and package travel<sup>89</sup>. The regulatory framework governing the Alternative Dispute Resolution also ensures that tourists in the EU have access to cost-effective, quality-assured dispute resolution should they experience a consumer rights issue while travelling<sup>90</sup>.

#### Topic 10: Improving the availability of online information on tourism offer

- Improving the online availability of validated information on sustainable, accessible, or specifically targeted tourism offers
- Developing partnerships with on-line portals and booking platforms to

provide more visibility to certified accommodation providers

- Ensuring information is available on consumer rights and dispute resolution mechanisms for tourists via the European Consumer Centre Network's digital channels

#### Key role of SMEs

In the EU, the majority of service providers in tourist destinations are small local owners. Micro and small enterprises generate about 64% of the value added of the tourism ecosystem and employ 84% of its workers<sup>91</sup>. The proportion of micro and small companies is particularly high in hospitality (hotels, bars and restaurants), with many owners operating independently or under franchise from large groups. This is also true for travel agencies and coaches, though to a lesser extent. Given the fragmentation of these supply chains, a substantial degree of coordination is needed to agree on common objectives and pathways to change.

In the future, local communities could become a key player in the transition towards sustainable tourism through social economy approaches. This could take place, for example, through community cooperatives or other forms of SMEs in which the local actors of the tourism supply chain are involved in the ownership of shared assets (promotion of the destination, coordination between tourist facilities, co-design and governance of online booking systems).

During the process to co-create a tourism transition pathway, stakeholders highlighted that microenterprises and SMEs face several challenges<sup>92</sup> in engaging with the twin transition, including a lack of knowledge of existing good practices and access to tools to implement them.

#### Topic 11: Easily accessible best practices, peer learning and networking for SMEs

- Establishing a collaboration platform for tourism SMEs and destinations that supports their access to information, specific tools, best

<sup>88</sup> [Attitudes of Europeans towards tourism - November 2021 - Eurobarometer survey](#)

<sup>89</sup> [The European Consumer Centre Network- ECC Net 90 Alternative Dispute Resolution for Consumers](#)

<sup>91</sup> [SWD\(2021\) 351 final](#), p.177

<sup>92</sup> These include increasing indebtedness, access to funding, staff availability, skills and awareness of the relevant opportunities. All these aspects are tackled later in this report.

practice and knowledge sharing opportunities to support their engagement in twin transition

## **Research, innovation and technology**

### **Circular tourism**

The stakeholder consultation recognised the need for research and innovation to boost several aspects of the circular tourism economy: to develop technologies, governance models, innovative transferable practices and large-scale pilots. Although tourism operators typically are not investing in R&I in other related sectors<sup>93</sup>, specific R&I needs go beyond tourism. They include, among other things:

- the development of sustainable fuels and transport technologies;
- processes and tools to reduce food waste;
- practices/technologies for efficient use of water resources (e.g. water reuse);
- energy and resource efficiency;
- circular food services and hospitality;
- reduction of disposable materials while ensuring health and safety of visitors;
- social innovation and governance models for reliable local supply chains, including local renewable energy projects;
- low-and zero-energy building technologies;
- new packaging materials; and
- development of new models for sustainable tourism.

Horizon Europe funding instruments<sup>94</sup> provide support for these areas under following calls:

- Climate-neutral and smart cities mission<sup>95</sup>;
- Climate, energy and mobility cluster<sup>96</sup>;
- Food, bioeconomy, natural resources, agriculture and environment cluster<sup>97</sup>;
- Culture, creativity and inclusive society cluster<sup>98</sup>.

The EU can also provide support for R&I initiatives and regional pilots, collaboration and management models under cohesion policy<sup>99</sup> and agricultural policy (European Agricultural Fund for Rural Development, EAFRD<sup>100</sup>), including cross-border regional cooperation initiatives

Both public and private-sector stakeholders are encouraged to develop European project consortia to address R&I needs for more circular tourism. Isolated areas such as islands could provide cases for experimenting with fully circular and climate friendly approaches as pilot projects for residents and visitors. Another goal should be to prioritise local renewable inputs in the energy mix. By investing in local renewable energy projects, tourist areas experiencing high seasonal demand can increase circularity, energy security and generate secondary income year-round.<sup>101</sup>

### **Topic 12: Research and innovation projects and pilots on circular and climate friendly tourism**

- Tourism stakeholders engaging in public-private co-operation to prepare research proposals for funding calls that accommodate circular tourism-related R&I projects and pilots
- Developing models and transferable practices for sustainable tourism
- Establishing large-scale pilots on sustainable tourism, e.g. on islands and remote regions, including the outermost regions

<sup>93</sup> In the 2021 EU R&D Investment Scoreboard, for example, TUI is ranked no. 587 of the EU top 1000 R&D investors with EUR 18.7 million in 2020. See <https://iri.jrc.ec.europa.eu/scoreboard/2021-eu-industrial-rd-investment-scoreboard>

<sup>94</sup> [Horizon Europe | European Commission \(europa.eu\)](#)

<sup>95</sup> [EU Mission: Climate-Neutral and Smart Cities | European Commission \(europa.eu\)](#)

<sup>96</sup> [Cluster 5: Climate, Energy and Mobility | European Commission \(europa.eu\)](#)

<sup>97</sup> [Cluster 6: Food, Bioeconomy, Natural Resources, Agriculture and Environment | European Commission \(europa.eu\)](#)

<sup>98</sup> [Cluster 2: Culture, Creativity and Inclusive society | European Commission \(europa.eu\)](#)

<sup>99</sup> [Cohesion Policy 2021-2027 - Regional Policy - European Commission \(europa.eu\)](#)

<sup>100</sup> [Common agricultural policy funds | European Commission \(europa.eu\)](#)

<sup>101</sup> JRC, Tourism, energy demand and the COVID-19, JRC128377, forthcoming

### **Measuring and reducing environmental footprint**

The European Green Deal calls for a standard method to substantiate green claims, and the circular economy action plan commits that “the Commission will also propose that companies substantiate their environmental claims using Product and Organisation Environmental Footprint methods” (PEF and OEF). This tool is currently in its transition phase<sup>102</sup>, as sector-specific category rules are being developed in collaboration with industrial stakeholders. These methods have already been applied for example in collecting green consumption pledges<sup>103</sup> and in developing a consumer footprint calculator<sup>104</sup>.

Any organisation can use this methodology today. However, comprehensive data collection by industry and sectoral category rules development is required to be able to compare data within a sector or product category on ‘average’, ‘low’ or ‘good’ performance. R&I is needed to help develop sectoral category rules development for specific tourism products and services in a transparent, non-discriminatory manner (e.g. considering peripheral destinations that need to import products). Tools and technologies are also needed to make applying the environmental footprint method more user friendly for SMEs. This would make the methodology accessible to them and facilitate data collection on the environmental footprint calculation to monitor the industry’s development on sustainability.

#### **Topic 13: Promoting the use of the PEF and OEF methodology and the development of sectorial category rules for the tourism ecosystem**

- Supporting the uptake of PEF/OEF methods in tourism industries to collect baseline data for sectoral category rules development
- Developing category rules for typical tourism products and services with considerations for different tourism contexts (e.g. remote locations)

- Developing tools to support tourism companies to make PEF/OEF assessments of their products and services

### **R&I on technologies and digital services**

Tourism operators generate data continuously through payment transactions, transport ticket purchases, participation in events, visiting cultural attractions, and by using of location positioning in mobile devices. This creates a wealth of data that, in full compliance with privacy and data protection legislation and users’ fundamental rights could be used to better match tourism supply and demand and creating new types of services. Interoperable technical specifications for tourism data sharing could also facilitate sharing data with mobility, agro-food, and cultural and creative industry ecosystems, for example. Tourism should learn from developments in other ecosystems. Research and innovation are needed to support the technical developments for data sharing, data governance agreements and technical interoperability issues.

Developing a common language and governance framework for using data is a priority area for the digital transition for tourism. The data space for tourism should provide interoperability for all operators and for users and providers in other data spaces (e.g. data on mobility<sup>105</sup>, data on agriculture<sup>106</sup>, data on health<sup>107</sup>, and digital data on cultural heritage) to effectively be a part of the European data economy. The support centre for data sharing<sup>108</sup> supports developing common frameworks for all sectoral data spaces. The Interoperable Europe initiative<sup>109</sup>, the upcoming Interoperable Europe Act and the Minimal Interoperability Mechanisms developed by and for cities in the [living-in.eu](https://living-in.eu) movement can provide important support for the data spaces. Like all data spaces, the tourism data

<sup>102</sup> [The Environmental Footprint transition phase - Environment - European Commission \(europa.eu\)](https://ec.europa.eu/euro-observatory/en/transition-phase)

<sup>103</sup> [Green Consumption Pledge Initiative | European Commission \(europa.eu\)](https://ec.europa.eu/euro-observatory/en/green-consumption-pledge-initiative)

<sup>104</sup> [Consumer footprint calculator](https://ec.europa.eu/euro-observatory/en/consumer-footprint-calculator)

<sup>105</sup> [Workshop on a Common European Mobility Data Space | Shaping Europe's digital future \(europa.eu\)](https://ec.europa.eu/euro-observatory/en/workshop-on-a-common-european-mobility-data-space)

<sup>106</sup> [Information Session on a Common European Agricultural Data Space | Shaping Europe's digital future \(europa.eu\)](https://ec.europa.eu/euro-observatory/en/information-session-on-a-common-european-agricultural-data-space)

<sup>107</sup> [European Health Data Space \(europa.eu\)](https://ec.europa.eu/euro-observatory/en/european-health-data-space)

<sup>108</sup> [Homepage | Support Centre for Data Sharing \(eudatasharing.eu\)](https://eudatasharing.eu/)

<sup>109</sup> [Interoperability and cooperation in the EU | Joinup \(europa.eu\)](https://ec.europa.eu/euro-observatory/en/interoperability-and-cooperation-in-the-eu)

space must also be fully consistent with the Data Act<sup>110</sup>.

The Digital Europe programme has launched a call for preparatory work<sup>111</sup> to create a data space for tourism. The same call targets preparations of other data spaces, which are also of relevance to the tourism ecosystem.

### Topic 14: Technical implementation for tourism data space

- Stakeholders to implement a preparatory action for tourism data space

To make effective use of the shared data, R&I is needed to develop and pilot data-driven destination management tools, practices and technologies to boost the sustainability of tourist destinations and reduce overcrowding of sites and services. This will lead to better experiences for tourists and residents. In addition, there should be a greater role for the cultural and creative industries (dominated by SMEs), as they can be involved in creating new markets and sustainability oriented services.

Virtual and augmented reality services provide new ways to help preserve natural and cultural resources at risk, while enabling real-like visitor experiences. Hybrid and augmented reality can enhance visitor experiences by increasing interaction and extending participation to tourism services (e.g. people at home interacting with a museum visitor or an event participant through virtual environment), or by experiencing digital reconstructions of historical sites. The technology can even help to simulate future developments of natural and cultural sites. They can be used to engage the customer with the tourism experience before and after travel, extending the time during which they engage with the service. Linking with the objectives of European data space for cultural heritage to digitise cultural heritage assets<sup>112</sup>, R&I in this area could provide new innovative, sustainable and accessible forms of tourism services. Tourism providers could develop

innovative approaches to make use of local digital twins, which will enable the next phase of smart and sustainable cities and communities<sup>113</sup>.

### Topic 15: R&I for digital tools and services in tourism

- Data-driven destination management models and mechanisms
- Innovative tourism services using advanced technologies (virtual reality, augmented reality, AI) and digitized cultural heritage

R&I and technologies in these areas can be developed by projects run under the Horizon Europe clusters "Digital, industry and space"<sup>114</sup> and "Culture, creativity and inclusive society"<sup>115</sup>, the EIT, DIGITAL Europe, the Creative Europe programme, national and regional support programmes. Moreover, sharing best practices among Member States can further leverage public funding and regional cooperation to stimulate R&I investment and the adoption of new technologies in the tourism industry.

### **Barriers to taking up new solutions**

Information on EU-funded projects and their results can be found on the Commission's platform of funding opportunities and project results<sup>116</sup>, CORDIS services on R&I projects<sup>117</sup>, Kohesio<sup>118</sup> and Keep.eu<sup>119</sup> platforms for cohesion policy funded projects. The results are not always well known or shared with other users, due to ineffective dissemination, lack of transferability, high cost or lack of skills, knowledge and interest from the potential users. With the increase in awareness of the green and digital transition among all tourism stakeholders, interest in experimenting with and taking up new solutions is expected to be high. It is therefore important to publicise existing solutions and transferable practices to supporting innovation in tourism. Equally, it

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<sup>110</sup> [Data Act: Businesses and citizens in favour of a fair data economy | Shaping Europe's digital future \(europa.eu\)](#)

<sup>111</sup> [Search Funding & Tenders \(europa.eu\)](#)

<sup>112</sup> [Commission recommendation \(EU\) 2021/1970](#) recommends that by 2030, Member States should digitise in 3D all cultural heritage at risk, and 50% of the most physically visited cultural and heritage monuments, buildings and sites.

<sup>113</sup> [Local Digital Twins: Forging the Cities of Tomorrow | Shaping Europe's digital future \(europa.eu\)](#)

<sup>114</sup> [Cluster 4: Digital, Industry and Space | European Commission \(europa.eu\)](#)

<sup>115</sup> [Cluster 2: Culture, Creativity and Inclusive society | European Commission \(europa.eu\)](#)

<sup>116</sup> [Projects & Results \(europa.eu\)](#)

<sup>117</sup> [CORDIS | European Commission \(europa.eu\)](#)

<sup>118</sup> [Kohesio](#)

<sup>119</sup> [Interreg, Interreg-IPA, ENI and IPA-IPA cross-border Cooperation projects, partners and programmes with European Union countries \(keep.eu\)](#)

will be important to invest in skills and capacity building for SMEs and destination management organisations.

The low level of digital skills among SMEs are a specific barrier to the take-up of new digital solutions. The skills and infrastructure needed to assess and integrate digital tools in tourism services are not only important for marketing but for improving the efficiency and sustainability of their processes and for developing innovative and improved services to meet the changing demand. It will be important to boost these skills and take-up of digital tools to respond to new trends (e.g. virtual reality, big data, block chain, digital nomads) and changing customer expectations.

EU tourism SMEs generally have a low degree of digitalisation and they typically lack skills, finance, infrastructure as well as mentoring and policy support<sup>120</sup>. Eurostat data shows that several digital economy and society indicators are especially low in the accommodation and food and beverage services, such as the use of social media and internet advertising (59% in 2019<sup>121</sup>) or electronic invoices in supply-chain management (27% in 2020).<sup>122</sup> The Digital Compass for 2030 sets targets for Europe's digital transformation, focusing on four key aspects: skills, infrastructures, business and government (public services)<sup>123</sup>. All these aspects are relevant to tourism SMEs.

Some stakeholders suggested that an important obstacle to adopting new practices by tourism SMEs is the lack of specific examples of how to do so and possibilities to exchange practical knowledge with peers. This highlights the need to provide more effective support mechanisms and peer learning between SMEs within and among destinations, as well as among destination management organisations.

#### Topic 16: Support for digitalisation of tourism SMEs and destinations

- Raising awareness of tourism SMEs on the benefits of digitalisation and on existing European, national and regional digitalisation programmes for SMEs

- Developing a searchable inventory on existing transferable digital tools and practices for SMEs and destinations
- Establishing a community of practice and a shared toolbox for data-driven destination management

<sup>120</sup> Dredge et al. (2019). [Digitalisation in Tourism](#)

<sup>121</sup> Eurostat data: [Use of any social media for internet advertising](#)

<sup>122</sup> Eurostat data: [Enterprises sending eInvoices suitable for automated processing](#)

<sup>123</sup> [Europe's Digital Decade: digital targets for 2030 | European Commission \(europa.eu\)](#)

## **Infrastructure needs to achieve the twin transition**

### **Sustainable mobility infrastructure**

Sustainable multimodal and active transportation modes in cities and regions can significantly contribute to green transition in tourism, but require updates to transport infrastructures. In cities, a 2017 needs assessment survey of sustainable urban mobility plans showed that on average only 37% of responding cities had implemented a sustainable urban mobility plan, varying greatly from 78% in France, to 6% in Greece.<sup>124</sup> The Commission is contributing to these plans by providing sustainable urban mobility indicators<sup>125</sup> and a self-assessment tool to help cities taking first steps<sup>126</sup>. These plans should consider and integrate input from both residents and visitors in order to help reduce greenhouse gases in tourist destinations.

Destinations in peripheral regions, rural areas and islands, including the EU outermost regions, have specific challenges relating to the travelling options available for visitors. In some cases, improving electrified rail infrastructures, connection time planning and multimodal travel hubs can improve the sustainable travelling options for travellers and facilitate travel across EU with a modern, safe and sustainable transport infrastructure. This can make ultra-peripheral regions, remote and peripheral areas and islands more accessible for intra-European and international tourism, and strengthen territorial cohesion. This would require paying particular attention to missing cross-border links and their completion. However, some destinations will always fully rely on air and maritime transport to serve their connectivity needs.

Sustainable travelling challenge should also be addressed by local travelling options at destination. At destinations, mobility infrastructure needs relate, for example, to slow mobility infrastructures (biking, pedestrian and green areas), as well as charging infrastructure for electric vehicles, infrastructure for electric scooters, bikes etc. Using such active mobility opportunities together with public transport options should

be encouraged both for residents and visitors.

### **Renovation and design to improve energy and resource efficiency, accessibility and resilience**

Collectively, the use of buildings in the EU are responsible for 40% of energy consumption and 36% of greenhouse gas emissions. These figures refer to the use and operation of buildings, including indirect emissions in the power and heat sector, not their full life cycle. The embodied carbon in construction is estimated to account for about 10% of total yearly greenhouse gas emissions worldwide.<sup>127</sup>

The renovation wave strategy<sup>128</sup> contains an action plan with specific regulatory, financing and enabling measures to boost building renovation, making construction more energy and resource efficient. The objective is to at least double the annual energy renovation rate of buildings by 2030 and to foster comprehensive and effective renovations which significantly improve the energy efficiency.

The Commission has launched the New European Bauhaus<sup>129</sup>, which brings together stakeholders and is based on sustainability, with a specific focus on circularity, aesthetics and social inclusion. The accessibility requirements in the European Accessibility Act<sup>130</sup> can contribute to improve the accessibility and inclusiveness of the building. The guidance on recovery and resilience plans identified building renovation as a priority for national recovery plans under the EU's flagship initiative 'Renovate'<sup>131</sup>.

Tourism-related buildings (e.g. hotels, stations, airports, accommodation and restaurant facilities) should also heed the call to double the annual renovation rate, and becoming leading examples. For tourism, this should also be used to improve the accessibility, attractiveness and functionality of the space for observing safety and health related possible exceptional measures, as has been necessary during COVID-19 pandemic. Furthermore, all new tourism buildings should follow the proposed Energy Performance of Buildings Directive<sup>132</sup>, which requires all new buildings from 2030 forward

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<sup>124</sup> [PolicyBrief\\_SUMPs\\_TO4.pdf \(interregeurope.eu\)](#)

<sup>125</sup> [SUMI \(europa.eu\)](#)

<sup>126</sup> [SUMP Self-Assessment Tool | Eltis](#)

<sup>127</sup> [SWD \(2020\) 550 final](#)

<sup>128</sup> [Renovation wave \(europa.eu\)](#)

<sup>129</sup> [New European Bauhaus : beautiful, sustainable, together. \(europa.eu\)](#)

<sup>130</sup> [Directive \(EU\) 2019/882 on the accessibility requirements for products and services](#)

<sup>131</sup> [SWD\(2021\) 12 final](#)

<sup>132</sup> [COM\(2021\) 802 final](#)



to be zero-emission, and new public buildings to implement the requirement already from 2027 onwards. Moreover, for the first time it brings forward the concepts of circularity and lifecycle. All new buildings by 2030 and large buildings already by 2027 should assess and report their carbon emissions during their whole life-cycle, following the methodology of the EU Level(s) framework<sup>133</sup>.

### **Digital infrastructure**

The stakeholder consultations highlighted the lack of good digital connectivity as a key issue in making progress on the digital tourism transition, especially in rural areas. Current analysis by the Joint Research Centre carried out for the EU Tourism Dashboard shows that the average internet speed differs greatly in different NUTS3 regions<sup>134</sup>. This has direct impacts on the capacity of these destinations to provide digitally enhanced tourism services or accommodate visitors who need reliable and fast internet connections (e.g. digital nomads working remotely). Meeting the Digital Compass objective to reach 5G coverage across the Europe by 2030<sup>135</sup> will be very important to achieve the digital transformation of the tourism ecosystem.

Tourism SMEs may also lack the basic digital infrastructure needed to implement more digital business processes, or consider developing digital tourism services. Although currently most companies have internet access, they do not necessarily use technology in their work processes or interactions with clients. They should receive support to invest in useful software for business management, marketing and customer interactions, to help them become part of the digital transformation.

### **Skills needs**

**Green skills.** Tourism actors need skills to understand the elements of environmental sustainability. These skills can help them meet the new policy requirements and recognise how addressing sustainability challenges could also provide new business opportunities with the increasingly environmentally-conscious customers. They also need skills to implement energy and

resource efficiency measures, as well as how to deploy renewables on-site. These are local jobs that cannot be delocalised, and local skills development is necessary.

The Commission has published a proposal for a Council Recommendation on learning for environmental sustainability<sup>136</sup>, together with a European sustainability competence framework<sup>137</sup>. These could guide the key elements also for the development of tourism-specific green skills training approaches.

**Digital skills.** Skills for using and strategically integrating digital tools in work processes can facilitate developing and implementing more effective and better quality services to meet the changing demand and expectations of the customers. Tourism actors need both basic and advanced digital skills. Tourism-specific digital skills approaches could be developed based on the European Digital Competence framework<sup>138</sup> which provides guidance of different elements to be included for different types of skills objectives.

Skills and jobs development for the twin transition play a key role to the long-term resilience of the tourism ecosystem. They will be further discussed in the later sections of this report on “Skills and workforce” and “Social dimension”.

<sup>133</sup> [Level\(s\) \(europa.eu\)](#)

<sup>134</sup> According to NUTS 2021 classification, there are 1166 regions at NUTS 3 level in the EU; [Background - NUTS - Nomenclature of territorial units for statistics - Eurostat \(europa.eu\)](#)

<sup>135</sup> [Europe's Digital Decade: digital targets for 2030 | European Commission \(europa.eu\)](#)

<sup>136</sup> [Learning for environmental sustainability | European Education Area \(europa.eu\)](#)

<sup>137</sup> [JRC Publications Repository - GreenComp The European sustainability competence framework \(europa.eu\)](#)

<sup>138</sup> [DigComp | EU Science Hub \(europa.eu\)](#)

## RESILIENCE

### **Europe as a globally competitive destination**

The European Union accounted for half of the world's international arrivals in 2019, with four Member States among the world's top 10 destinations for holidaymakers<sup>139</sup>. In 2019, international arrivals at tourism accommodations accounted for 41% of all travellers in the EU, 23% coming from within the EU and 18% from outside<sup>140</sup>. Accelerating the twin transition in the EU can give it a key advantage of staying ahead in providing nature-based tourism, unique cultural experiences and digitally facilitated booking and travel planning.

Travelling to the EU is facilitated by the common visa policy, which allows nationals from 102 non-EU countries to access the border-free Schengen area with a single visa or even visa-free for nationals of 60 countries<sup>141</sup>. Key to boosting EU competitiveness is to remain at the forefront of the digital transition in facilitating travel for both EU and non-EU visitors. To this end, the Commission intends to present in 2023 a proposal for a regulation on the digitalisation of travel documents and the facilitation of travel, which will accelerate border-crossing processes.<sup>142</sup>

#### Topic 17: Seamless cross-border travelling

- Digitalising of Schengen visa procedures for non-EU nationals
- Digitalising travel documents for EU citizens for improved and faster border processes

## **Resilience to disruptions**

The recovery of business confidence in tourism, rising from bottom position (see Figure 1) in 2021 demonstrates the resilience of the ecosystem, while illustrating needs to draw lessons. The 2021 summer season demonstrated a partial recovery of demand from European travellers. In August 2021, flights returned to 71% of 2019 levels across Europe, with greater demand for domestic flights than international flights, although with wide variation between countries.<sup>143</sup>

While a return to pre-crisis levels for international travellers from outside Europe is not expected until 2024<sup>144</sup>, destinations in the EU should be able to partly compensate this with demand from within the EU. Eurostat data from platforms showed that domestic tourism was much more resilient to the shock overall.<sup>145</sup> In countries where the share of domestic tourists in 2019 was already high (compared to EU or world tourists), the impact of the COVID-19 crisis was much lower and the number of guests even increased in 2020 in some areas. A Eurobarometer survey from October 2021<sup>146</sup> indicated that a third of EU citizens expect to travel more in their own country as a long-term impact of the COVID-19 pandemic.

The short-term rental sector has also proved particularly resilient. Thanks to its flexibility<sup>147</sup> and market structure, short-term rentals can play an important role in the ongoing transformation of the tourism ecosystem and in meeting shifting demands. Short-term rentals can help meet tourism demand in lesser-known destinations and accommodate peak demand of tourism where the traditional accommodation sector has limited supply. New uses of short-term rentals have also emerged with shifts from renting for tourism to (tele)working arrangements or from cities to rural areas<sup>148</sup>.

The EU Digital COVID-19 Certificate (EU DCC)<sup>149</sup> contributed greatly to the restart of tourism during the summer 2021. 65% of EU

<sup>139</sup> [International Tourism Highlights, 2020 Edition | World Tourism Organization \(e-unwto.org\)](#)

<sup>140</sup> Eurostat data from [tour\\_occ\\_arnat](#) and [tour\\_occ\\_arnraw](#)

<sup>141</sup> For stays of up to 90 days in any 180-day period.

<sup>142</sup> [COM\(2021\) 277 final](#)

<sup>143</sup> [EUROCONTROL Data Snapshot #16](#) (7 Sept 2021).

<sup>144</sup> [European Tourism 2021 – Trends & Prospects \(Q3/2021\) - ETC Corporate \(etc-corporate.org\)](#)

<sup>145</sup> [Short-stay accommodation offered via online collaborative economy platforms - impact of the Covid-19 pandemic - Statistics Explained \(europa.eu\)](#)

<sup>146</sup> [Attitudes of Europeans towards tourism - November 2021 - Eurobarometer survey](#)

<sup>147</sup> Supply flexibility is a unique feature of the sharing economy. See Zervas, Georgios, Davide Proserpio, and John W. Byers.

"The rise of the sharing economy: Estimating the impact of Airbnb on the hotel industry." *Journal of marketing research* 54.5 (2017): 687-705.

<sup>148</sup> According to Airbnb data, the number of booking in rural area has increased by 40% in 2020 compared to 2019. See [Airbnb fait un meilleur chiffre d'affaires qu'avant la pandémie et signe le meilleur trimestre de son histoire \(lefigaro.fr\)](#)

<sup>149</sup> [EU Digital COVID Certificate | European Commission \(europa.eu\)](#)

residents surveyed said that the EU DCC was the safest means to facilitate travel in Europe during the pandemic<sup>150</sup>. It has become a global standard, with over 80 countries either connected to the EU DCC system or applied to do so by December 2021. Harmonised approaches to travelling are also supported through the '[EU Digital Passenger Locator Form](#)' created in June 2021<sup>151</sup>.

Joint or coordinated travelling rules within the EU as well as clear and updated information on the rules are key to recovery and to competitiveness. We must continue to learn from the COVID-19 pandemic to put in place the right structures, procedures and rules to be able to deal quickly with future exceptional circumstances with minimal disruption to travel and tourism.

#### Topic 18: Coordinated management and updated information on travelling

- Implementing and extending the EU DCC framework as needed
- EU Member States to provide up-to-date information on their travel rules via 'Re-Open EU'
- Drawing lessons from COVID-19 to better respond to future exceptional events

Eurobarometer survey 499 showed that 49% of EU citizens expect to pay more attention to health and safety measures in the long-term as a result of the COVID-19 pandemic. This highlights the need for tourism services and facilities to ensure safety for visitors. At the Commission's initiative, CEN, the European Standardisation Organisation, developed a safety protocol and a COVID-19 Safety Seal label for tourism establishments<sup>152</sup>. Displaying this seal or another national/regional health and safety certificate can boost customer confidence and ensure the health and safety of both tourism workers and their customers, even in exceptional circumstances.

Upcoming taxation initiatives announced in the action plan on fair and simple taxation<sup>153</sup> (i.e. taxation of passenger transport, review

of the VAT scheme for travel agents, and VAT rules for the digital age – involving services provided through digital platforms) can have a positive effect on the green and digital transition, and on the resilience of the tourism ecosystem.

### **Rural and remote regions**

The 2040 vision for rural areas highlights their potential and their importance to European identity.<sup>154</sup> Rural areas can provide unique nature and cultural experiences for visitors, but at the same time may experience problems of limited connectivity in terms of transport or digital connectivity. Rural areas covered 83% of the EU in 2018<sup>155</sup>, and they may suffer from strong seasonal fluctuations in tourism<sup>156</sup> which makes them vulnerable to disruptions to the typical tourism flows. The most remote parts of the EU – the outermost regions – are highly dependent on tourism as it accounts for a particularly high share of their economy (up to 35% of GDP). They suffer from seasonal fluctuations and are fully dependent on (limited) air connections. According to a recent study on the COVID-19 pandemic on the outermost regions, the number of tourists decreased by approximately 70% in 2020 in these regions and tourism activity fell by up to 90%.<sup>157</sup>

Stakeholder consultations highlighted the specific circumstances of islands and peripheral regions, such as outermost regions for green transition, as the connectivity may be highly dependent on air transport and imported food ingredients or energy, for example. The EU can boost the long-term resilience of remote regions by comprehensive smart and sustainable tourism strategies, based on the unique strengths of the region, well-planned market segmentation, diversification of tourism services to different customer bases and by integrating the wellbeing of local residents with the services provided for tourists.

The use of cultural centres such as museums, theatres, libraries and archaeological sites, together with the integration of European and regional tourism policies, UNESCO sites, archaeological, marine and natural parks, villages and spa tourism, will be fundamental to increase the

<sup>150</sup> [Flash Eurobarometer](#), September 2021. (Q7)

<sup>151</sup> [EU dPLF – EU Digital Passenger Locator Form \(euplf.eu\)](#)

<sup>152</sup> [New European Tourism Covid-19 Safety Seal available \(europa.eu\)](#)

<sup>153</sup> [COM\(2020\) 312 final](#)

<sup>154</sup> [A long-term vision for the EU's rural areas | European Commission \(europa.eu\)](#)

<sup>155</sup> [EU rural areas in numbers | European Commission \(europa.eu\)](#)

<sup>156</sup> [Analysing spatiotemporal patterns of tourism in Europe at high-resolution with conventional and big data sources - ScienceDirect](#)

<sup>157</sup> [Study on the impact of the COVID-19 pandemic on the outermost regions – Final report, October 2021 \(europa.eu\)](#)

attractiveness of tourism. For this, it is essential to develop and implement smart and sustainable tourism strategies at the right level in order to emphasise local identity specialities by encouraging the promotion and quality craftsmanship, especially for regions that highlight their gastronomy, local knowledge and traditions. For example, tourism could be a key economic driver for the green transition in coal mining regions, with a new ecological focus that draws on the natural and cultural resources of these regions.<sup>158</sup>

### ***Changing climate***

Remote and outermost regions also often face climate change-related challenges and natural catastrophes, as highlighted in the strategy on adaptation to climate change<sup>159</sup>. They need to actively assess measures to adapt to climate change and to preserve biodiversity, while developing economic activities and safeguarding their cultural heritage to meet the demands of digital and green transition.

However, the changing climate does not only affect remote areas, it is having an impact everywhere. Its effects are strongly felt in large cities (e.g. heatwaves, heavy rainfall, rising water levels) and affecting them as tourism destinations. Therefore, climate mitigation and adaptation measures should always be included in the smart and sustainable tourism strategies on national, regional and local levels. Tourism destinations can participate in collaborations under the Adaptation to Climate Change mission under Horizon Europe.

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<sup>158</sup> See example: [Romania's coal-black heartland embraces Europe's Green New Deal | Euronews](#)

<sup>159</sup> [COM\(2021\) 82](#)

## **Infrastructure**

The infrastructure needs identified by the stakeholders during the co-creation process were covered in a previous section of this report. The needs were linked to overcoming the barriers to the green and digital transition (sufficient digital infrastructure, improving the energy efficiency of tourism attractions and travel infrastructure, reducing the environmental footprint of tourism), which at the same time are the key for long-term sustainability of the more green and digital tourism services. New buildings should be designed to accommodate different groups of potential customers, including those with disabilities or limited mobility, and the current travel and tourism infrastructure should be renovated with the same goal, following the principles of the New European Bauhaus. COVID-19 has shown that it is important to be able to adjust the travel and tourism services for health and hygiene reasons, and this should be taken into account when renovating existing buildings and designing new facilities.

### **Energy infrastructure**

The carbon footprint of tourism is somewhere in the order of 5 to 10% of global emissions depending on estimates. Energy needs at tourist destinations (e.g. the travel and hospitality sectors) are partly responsible for these figures. Moreover, tourism-dependent remote and island economies often experience energy insecurity, highly volatile seasonal energy demand, and are exposed to price volatility of transferred fossil fuels as their power sector is usually based on local fossil-fuelled generation plants and/or interconnections.

This situation highlights the need for energy infrastructure upgrades based on renewable energy sources to meet sustainability and local community needs in tourist destinations. Infrastructure updates on the network could increase the share of local renewable sources via interconnections with mainland grids, hybrid generation systems or by integrating storage to increase the overall carrying capacity of the system. From the demand side, rethinking the structure of the hospitality, accommodation and travel sectors would be important (e.g. extending the tourist season to avoid seasonal power peaks). Renewable energy generation projects can then feed the local energy mix with clean energy reducing the environmental footprint of tourism while generating a passive income for local communities all year round. Finally, energy

efficiency upgrades will reduce the overall demand for energy, helping to make the industry more sustainable.

Thus, investing in new and improved energy infrastructure with a focus on local renewable energy production and energy efficiency makes both financial and ecological sense for the tourism industry. As the EU's tourism industry is made up of 2.3 million businesses, primarily small and medium-sized, these could be the backbone of projects targeting sustainable energy infrastructure improvements.

## Skills and workforce

In 2017, over 20% of people employed in accommodation and other selected tourism industries had low educational qualifications.<sup>160</sup> A Cedefop analysis on tourism job adverts shows that they ranged from elementary to high-skilled occupations.<sup>161</sup> Job adverts highlighted needs for soft skills (teamwork, communication, adaptability), ICT skills and business related skills (administration, accounting, budgeting or marketing). In order to meet the challenges of the twin transition and to provide sustainable tourism services, all workers need to develop green and digital skills, as described earlier in this report, in addition to or as part of their professional qualifications and competences. To ensure tourism in the EU, and especially tourism SMEs, remain competitive and build their resilience, it is important that workers also develop strategic and innovation skills.

**Entrepreneurship skills.** The development of entrepreneurial capacity (marketing, budgeting, adaptability, innovation) can help tourism companies and SME owners to better develop their market segments, analyse their cultural, economic, environmental and social business contexts and their options for developing sustainable and resilient business plans. The European entrepreneurship competence framework<sup>162</sup> provides guidance on how to structure skills needed to turn ideas into value, and could be used as a basis for tourism-specific training approaches.

**Governance and strategic skills.** The stakeholder consultations highlighted that in addition to the SMEs and all tourism industry, strategic and administrative skills should also be improved at the level of policy development and destination management. There should be awareness raising and learning opportunities on sustainability, digitalisation and strategic collaborative governance of tourism ecosystems for national and regional authorities and all levels of destination management organisations.

### Topic 19: Awareness raising on skills needs for twin transition in tourism

- Preparing information materials on skills needs for different types of tourism actors (as part of EU Pact for Skills for Tourism activities)

## Shift of mindset

Based on the results of Eurobarometer 499<sup>163</sup>, 82% of EU citizens are ready to change their behaviour in favour of more sustainable practices. One in three is ready to pay more for such changes. However, there are differences between countries, age groups and education levels, so it would be beneficial to organise awareness campaigns on the benefits and opportunities of sustainable tourism.

Data from Eurobarometer survey 499 also revealed that almost third (32%) of respondents with a low education level (they left school at age 15 or younger) stated that they 'do not know' if trustworthy information on sustainability related question items is easy or difficult to find. For respondents who completed their education at age 20 or over, this share is 18%, which is lower but still a considerable share. Not knowing whether finding such information is easy or not implies that these respondents have not tried to search for it. This further supports the need to improve awareness raising campaigns about sustainability and about recognising environmentally friendly tourism services. For example, the new consumer agenda<sup>164</sup> proposes measures to improve uptake and awareness of the EU Ecolabel scheme by running communication campaigns and developing partnerships with stakeholders, to promote the EU Ecolabel also in the online platforms.

Stakeholders highlighted that there may be some resistance from microenterprises and SMEs to change their models which have worked well until the COVID-19 pandemic. For example, 18.9% of SMEs do not consider the use of digital technologies necessary<sup>165</sup>. Action is needed at local and regional level to reach tourism microenterprises and SMEs to inform and guide them on the benefits of shifting towards more environmentally

<sup>160</sup> [Tourism industries - employment - Statistics Explained \(europa.eu\)](#)

<sup>161</sup> Cedefop (2020). [Skills developments and trends in the tourism sector](#)

<sup>162</sup> [EntreComp: The entrepreneurship competence framework | EU Science Hub \(europa.eu\)](#)

<sup>163</sup> [Attitudes of Europeans towards tourism - November 2021 - - Eurobarometer survey \(europa.eu\)](#)

<sup>164</sup> [COM/2020/696 final](#)

<sup>165</sup> [SME Annual Report 2020/2021](#), p. 71.

friendly and digitally facilitated services, in response to the changing needs of tourists and residents.

The stakeholder discussion also identified the need to shift mindsets on the role of the local tourism destination organisation – whether its key role should only be to market the services of the destination or to also support their development and transition. This is a key question to consider when clarifying approaches and resources for the destination. The national and regional tourism strategies should give guidance on destination management models and on interactions between the destination marketing/management organisation, the local authorities and all operators in the tourism ecosystem, including residents.

Since good examples are important to support change and innovation, it could be beneficial to forge links between quality destinations, which have been awarded on aspects relevant to the green and digital transition and resilience in tourism. For example, the winners of the yearly awards of European Capitals of Smart Tourism<sup>166</sup>, European Capitals of Culture<sup>167</sup>, European Green Capital<sup>168</sup>, European Capital of Innovation<sup>169</sup>, EU Access City<sup>170</sup> and European Heritage Awards<sup>171</sup> could have very productive exchanges, which could provide excellent examples and good practices for other cities to follow.

#### Topic 20: Awareness raising on changes in tourism demand and the opportunities of twin transition for tourism

- Dissemination campaign on the tourism transition pathway to destination authorities, tourism management organisations and SMEs as to promote the relevance of actions linked with the twin transitions and resilience
- Awareness-raising activities to increase the uptake and visibility of sustainability tools, as well as consumers' demand of sustainable options.
- Supporting networking and best practice sharing by award-winning

cities in Europe on smart tourism, culture, sustainability, innovation, accessibility and European heritage

#### New skills profiles and training approaches

In order to meet the skills needs of the tourism workforce, recognised new skills profiles have to be incorporated in the overall policy and curricula for vocational education and training. These should build on existing VET structures in Member States, and involve current actors in the field, such as education authorities, social partners and institutions for vocational and higher education. Also private sector should be consulted on the skills needs.

The Erasmus+ programme already supports and could further promote partnerships between universities and vocational education institutions across the EU to develop tourism curricula that meet the new skills needs. The programme also promotes student and staff mobility, which can enhance the capacities of educational institutions.<sup>172</sup>

#### Topic 21: Educational organisations to engage in developing and renewing tourism education

- Incorporating new skills profiles in vocational education and training policy and curricula, through cooperation between education authorities, social partners and institutions for vocational and higher education
- Developing tourism curricula through cooperation partnerships with the support of Erasmus+ key action 2
- Developing skills and capacities of tourism education staff and students through Erasmus+ mobility opportunities for vocational and higher education.

<sup>166</sup> [An EU initiative to reward innovative and smart tourism in European Cities \(europa.eu\)](#)

<sup>167</sup> [European Capitals of Culture | Culture and Creativity \(europa.eu\)](#)

<sup>168</sup> [European Green Capital \(europa.eu\)](#)

<sup>169</sup> [The European Capital of Innovation Awards \(europa.eu\)](#)

<sup>170</sup> [Access City Award - Employment, Social Affairs & Inclusion - European Commission \(europa.eu\)](#)

<sup>171</sup> [Homepage - European Heritage Awards / Europa Nostra Awards](#)

<sup>172</sup> [Opportunities under Erasmus+ | Erasmus+ \(europa.eu\)](#)

## **Reskilling and upskilling of the workforce**

In the context of the EU Pact for Skills<sup>173</sup>, the Commission invites public and private-sector organisations to join forces and take action to upskill and reskill tourism workers in the EU. The invitation to join the Pact for Skills in Tourism was launched in 2021 for companies, employees, national, regional and local authorities, social partners, cross-industry and sectoral organisations, education and training providers, chambers of commerce and employment services.<sup>174</sup> The Pact, with a joint agreement for common targets, was launched in January 2022<sup>175</sup>, and the invitation for new companies and partnerships to join will remain open. This Pact will provide common support, leadership and monitoring for tourism skills development among EU tourism stakeholders, highlighting the need to reskill and upskill the tourism workforce for the twin transition and changing demands of tourism.

Currently, several tourism sectors, the hospitality industry in particular, lack skilled workers. New, effective and inclusive training approaches are needed to help integrate the new workforce in the job market swiftly, benefiting from training opportunities combined with actual work tasks. There is the potential to attract new workers from the workforce leaving carbon-intensive sectors. Reskilling these workers should be a priority to avoid overall job losses and to benefit the tourism sector. There also needs to be specific attention given to training specialised tourism experts and managers in middle and high positions.

### **Topic 22: Pact for skills in tourism**

- Establishing of national, regional and local skills partnerships in major EU tourism regions
- Engaging tourism companies, education providers, trade unions and other organisations to commit to jointly agreed training targets for their workforce

- Fast training courses, apprenticeship schemes and blended models for the unemployed and job seekers

## **Skills support for SMEs**

Skills partnerships for tourism stakeholders under the Pact of Skills will provide training opportunities for tourism workers across the tourism ecosystem, including those working in or managing SMEs. Other skills support sources include:

- Erasmus for young entrepreneurs<sup>176</sup> is a cross-border exchange programme, which gives new or aspiring entrepreneurs the chance to learn from experienced entrepreneurs running small businesses in other countries. This can provide learning and innovation experiences both for the new entrepreneur and the hosting experienced SME entrepreneur.
- EU Digital Skills and Jobs platform provides information, resources and training opportunities relating to digital skills, in collaboration with 25 national coalitions for digital skills.<sup>177</sup>
- Next Tourism Generation Alliance provides skills resources relating to digital, social and green skills in tourism.<sup>178</sup>
- UNWTO Academy provides information on courses, webinars and resources on tourism, for professionals and those who wish to become one.<sup>179</sup>

### **Topic 23: One-stop-shop for learning opportunities for tourism SMEs**

- Providing a user-friendly digital access point for tourism SMEs on payable/free self-learning resources and updated announcements of upcoming training events from different providers.
- Providing an online space where tourism SMEs can connect with each other to share learning from one another

<sup>173</sup> [Pact for Skills - Employment, Social Affairs & Inclusion - European Commission \(europa.eu\)](#)

<sup>174</sup> [Invitation to join the pact for skills in Tourism - NTG](#)

<sup>175</sup>

<https://ec.europa.eu/social/BlobServlet?docId=25214&langId=en>

<sup>176</sup> [European business exchange programme - Erasmus for Young Entrepreneurs \(erasmus-entrepreneurs.eu\)](#)

<sup>177</sup> [Training offers | Digital Skills and Jobs Platform \(europa.eu\)](#)

<sup>178</sup> [Resources HUB - NTG \(nexttourismgeneration.eu\)](#)

<sup>179</sup> [UNWTO Academy | UNWTO](#)



## Social dimension

### Fairness and attractiveness of tourism jobs

The tourism ecosystem employs more female than male workers - with the highest proportions in accommodation, travel agencies and tour operators. In 2017, 13% of people employed in tourism were young workers.<sup>180</sup> Hourly earnings and labour costs in tourism are significantly lower than in the total economy and with a relatively high proportion of temporary contracts and lower job seniority.<sup>181</sup> Women in tourism earn about 15% less than their male counterparts.<sup>182</sup> On a global level, they remain substantially underrepresented as leaders, and they make up only 21% of board members in tourism businesses.<sup>183</sup>

One of the key challenges for the recovery and resilience of tourism is the lack of workforce. Due to the lockdowns and reduced working opportunities, many workers from accommodation, food and beverage services, and travel agency activities moved to other sectors. Developing attractive career paths with stable and quality employment, and ensuring fair wages and good working conditions through collective bargaining, will be essential to attract and retain a skilled workforce, and to relaunch EU tourism with improved long-term resilience.

#### Topic 24: Fairness and equality in tourism jobs

- Tourism companies to offer stable and decent employment, with fair and equal pay, full social security coverage, respect of workers' rights to organise and to bargain collectively, working contracts and gender equality
- Public tourism organisations to lead by example in employing fair employment practices

- Competent authorities to carry out inspections and controls on working conditions in the sector

The social economy with collaborative digital platforms is playing an increasing role in the tourism ecosystem. Platforms can facilitate access to job opportunities with flexible conditions, but at the same time they may lead to precarious working situations. A person may in practical terms work as a platform employee, but have no official employment status or social protection linked to the job<sup>184</sup>. Such risks exist for example for workers under platform-based passenger transportation services, food delivery services and local experience services offered under platforms, such as guided visits, home-offered meal experiences, or cultural cooking or dancing classes. The measures published by the Commission to improve the working conditions in platform work<sup>185</sup>, developing guidelines about collective agreements regarding the working conditions of solo self-employed people<sup>186</sup> and the social economy action plan<sup>187</sup> will address several issues important for persons working in tourism.

### Accessibility for persons with disabilities

There are approximately 87 million people with some form of disability in the EU<sup>188</sup>, and in 2020, 20.6% of the EU population was aged 65 or over<sup>189</sup>. Mindful that the EU population is ageing, the over 65s represent a significant consumer base for tourism, visiting and travelling with family and friends. In 2019, tourists over 55 years old already accounted for 41% of all overnight stays for tourism.<sup>190</sup> Moreover, and as highlighted in the UN Convention on the Rights of Persons with Disabilities<sup>191</sup> (to which the EU and all the Member States are parties) and the Strategy for the Rights of Persons with Disabilities 2021-2030<sup>192</sup>, people with disabilities have the right to equal access to tourism (travel, hospitality, cultural activities). Accessible and inclusive

<sup>180</sup> [Tourism industries - employment - Statistics Explained \(europa.eu\)](#)

<sup>181</sup> [Tourism industries - employment - Statistics Explained \(europa.eu\)](#)

<sup>182</sup> UNWTO (2019). [Global report on Women in Tourism](#)

<sup>183</sup> [Tourism | European Institute for Gender Equality \(europa.eu\)](#)

<sup>184</sup> Hauben, Lenaerts & Wayaert (2020). [The platform economy and precarious work](#). Study report for the EMPL committee of the European Parliament.

<sup>185</sup> [Improving working conditions in platform work \(europa.eu\)](#)

<sup>186</sup> [Guidelines for collective agreements solo self-employed people \(europa.eu\)](#)

<sup>187</sup> [Action Plan to boost the social economy and create jobs \(europa.eu\)](#)

<sup>188</sup> <https://www.disability-europe.net/downloads/1046-edc-task-2-1-statistical-indicators-tables-eu-silc-2018>

<sup>189</sup> [Population structure and ageing - Statistics Explained \(europa.eu\)](#)

<sup>190</sup> [Tourism trends and ageing - Statistics Explained \(europa.eu\)](#)

<sup>191</sup> [Article 30 – Participation in cultural life, recreation, leisure and sport | United Nations](#)

<sup>192</sup> [COM\(2021\) 101 final](#)

tourism is a key to helping all people participate fully in society. It is therefore important to ensure the supply of accessible tourism facilities in all destinations and provide clear and accessible information about them to travellers planning and reserving their stays and activities. According to Eurobarometer study 499 in 2021, 39% of EU citizens considered that information on the accessibility of tourism services was rather difficult or very difficult to find, and this share was higher among older people.

For people over 65 who did not travel for overnight trips, 47% stated health as one of the main reasons.<sup>193</sup> Specific health needs were also mentioned in the stakeholder consultations as a limiting factor for people to travel and enjoy tourism. Developing adapted accommodation facilities could provide a competitive advantage considering these specific markets, while at the same time enabling broader groups of people to enjoy visits to different areas and cultural experiences. Beyond the health-related safety and facilities of tourism establishments, travellers who need healthcare abroad, should be able to access the services they need while travelling. This need will rise more as older people represent a growing share of travellers. Further use and development of electronic cross-border health services such as e-prescription and patient summaries could facilitate the development of tourism in the EU for people who need health care abroad.

Increased demand for ecological tourism services also raises the need to support more accessible nature tourism services and infrastructure. Developing accessible virtual reality and augmented reality solutions can provide alternative ways to access natural and cultural sites. At the same time, attention should be given to people with disabilities while implementing the digital transition in tourism marketing, information sharing, reservation services and providing tourism experiences.

### Topic 25: Enhancing accessible tourism services

- Raising awareness of the importance of accessibility in tourism
- Improving the supply and visibility of accessible tourism services

- Applying EU rules on accessible public procurement

### **Access for all**

Based on Eurostat statistics from 2019, 35% of EU residents of 15 years or older did not make overnight trips.<sup>194</sup> When considering all types of travelling, including daytrips, the Eurobarometer survey 499 from 2021 showed that 11% of EU citizens travelled “never” and 9% travelled only once every few years before COVID-19.<sup>195</sup> Tourism should not be considered only to cover overnight trips, but also include same-day trips. Overnight trips may be more difficult for people with economic limitations, health conditions or family-related specific concerns. The share of older people not doing overnight trips was higher than younger people, and 52% of persons not doing overnight trips mentioned financial reasons for it.

Access for all to tourism could be boosted by developing moderately priced off-season accommodation and travelling opportunities for unemployed, retired and people with low income. However, for example school holidays may restrict when families can travel. The destinations should ensure a variety of services for people with different economic facilities, to boost accessibility of travelling to all types of people and families should all-year-round. The service providers should also ensure price diversity in their environmentally friendly tourism offer so that everyone can also participate in contributing to the green transition of tourism.

In addition to accessibility needs related to disabilities, health reasons or economic facilities, the tourism destinations should provide services and sufficient safety for customers from different religions, sexual orientations, families or solo travellers, etc. Considering diverse groups of clients can contribute to the competitiveness and resilience of the destination, especially if information of these opportunities is made clearly available online for the customers to take into account when planning and booking their services. These services could also benefit customer groups in the local destination, in the increasingly multicultural and diverse settings across the EU.

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<sup>193</sup> [Tourism trends and ageing - Statistics Explained \(europa.eu\)](#)

<sup>194</sup> [Tourism trends and ageing - Statistics Explained \(europa.eu\)](#)

<sup>195</sup> [Attitudes of Europeans towards tourism - November 2021 - Eurobarometer survey \(europa.eu\)](#)

## Wellbeing of residents

Tourism can provide important economic support for urban and rural destinations and their SMEs. At the same time, it is important to ensure that tourism does not cause harm to the nature, local environment, social and cultural wellbeing of the local residents. Tourism services should not be steered and provided to visitors in ways that risk harming the local environment, culture or its people. This would reduce the attractiveness of the destination over the long term by reducing its environmental and cultural authenticity.

Key factors that may have harmful effects on the social sustainability of local destinations are the perceived negative direct impacts of visitors (crowding, nuisance, increased waste, harm to nature or buildings) and indirect impacts (higher prices for services, changed housing markets, gentrification and access to business premises in city centres). The stakeholder consultations highlighted that the well-being of residents is a key aspect to the long-term sustainability of tourism. For this reason, the destination level tourism management organisation should include residents in the planning and follow-up of tourism activities and impacts.

The COVID-19 crisis has shown that more resilient business models can be achieved by providing services that benefit both residents and visitors. In this way, sudden changes to visitor flows do not paralyse local economy. The Booking.com Sustainable Travel Report states that 73% of travellers want to have authentic experiences that are representative of the local culture<sup>196</sup>. Developing services that are of interest to local residents provides natural meeting places between residents and visitors in authentic local cultural attractions and practices.

### Topic 26: Tourism services for visitors and residents alike

- Diversifying and developing tourism services so that they benefit both residents and visitors
- Taking into account different types of customers, such as families or individuals, or people with different

religious, spiritual or sexual orientations

## Sustainable tourism for the younger generation

When thinking of a forward-looking twin transition with long-term resilience, it is critical to ensure that the future generation of tourists share the values and objectives of the long-term transition, both as providers and consumers of tourism. This should be supported by basic education that advocates sustainable behaviour with innovative education solutions such as those developed by the Education for Climate Coalition<sup>197</sup> and following the European sustainability competence framework<sup>198</sup>. They should all also learn to become digitally competent consumers, workers and citizens, learning the necessary digital skills following the European Digital Competence framework<sup>199</sup>.

It is also important to foster and support the interest of young people in the EU to travel and learn about the history and culture of Europe through concrete personal experiences and exchanges. 2022 will be the European year of youth. It will highlight options for young people to travel throughout Europe, through the support of Discover EU and the European Youth Portal<sup>200</sup>. Overall, Discover EU<sup>201</sup> will fund up to 700 000 young people between 2021-2027 to travel by rail and learn about the richness and diversity of Europe's nature, culture and people.

<sup>196</sup> Booking.com (2021) [Sustainable Travel Report](#).

<sup>197</sup> [Education for Climate Coalition | Education for Climate Coalition \(europa.eu\)](#)

<sup>198</sup> [GreenComp: the European sustainability competence framework | EU Science Hub \(europa.eu\)](#)

<sup>200</sup> [European Youth Portal | European Youth Portal \(europa.eu\)](#)

<sup>201</sup> [DiscoverEU | European Youth Portal \(europa.eu\)](#)

## INVESTMENTS AND FUNDING

Both public and private-sector funding play a key role in the tourism ecosystem, and public-private partnerships are important drivers of the green and digital transition. They play an important role in enabling and supporting greener practices, facilitating data sharing and digital innovation, and supporting R&I and skills development in all sectors and for all involved actors in the tourism ecosystem.

### *Private investment and loans*

Private investment plays a key role in the tourism ecosystem. Travel restrictions and impediments as well as multiple lockdowns since March 2020 have heavily reduced the capacity of the EU tourism ecosystem to invest in the development of more resilient supply chains and new services (e.g. decarbonised, slow tourism). The estimated investment gap for 2020-21 is EUR 161 billion (the highest investment need out of all ecosystems)<sup>202</sup>. The 'World Travel & Tourism Council' estimates that capital investment in travel and tourism fell by 29.7% in 2020 alone.<sup>203</sup>

Most sectors in the tourism ecosystem have had to reassign their investment budget and borrow money to cover fixed costs during the pandemic. This high level of indebtedness makes refinancing and cash raising for medium term investments more complicated. The only major exception is with capital investment linked to accommodation. Contrary to other sectors like airlines or cruises, in which assets depreciate rather quickly, hospitality still manages to raise funds for real estate investment. Investment levels, in particular foreign direct investment, are recovering with many pre-COVID projects being taken

off hold, despite problems affecting the construction sector's supply chains<sup>204</sup>.

The Commission is supporting investment in sustainable activities through a common classification system for sustainable economic activities, or "EU taxonomy", following the action plan on financing sustainable growth<sup>205</sup>. The European Investment Bank provides loans for example to hotels, the hospitality sector, cultural infrastructure, theme parks and transport infrastructure.<sup>206</sup> In particular, it provides support for energy efficiency and urban regeneration.

### *Barriers to investment*

Despite various support mechanisms<sup>207</sup>, the COVID-19 shock has had a serious effect on the liquidity of tourism companies, due to lockdowns, services closures and fewer customers. This lack of liquidity and accumulated debt may be barriers to private investment in the measures needed for the twin transition, especially by smaller companies. Various regulatory and market uncertainties are also affecting the investment climate.

The necessary contribution of travel and tourism to the Climate Law and the 2050 objectives for carbon neutrality means likely changes in terms of public obligations, such as environmental permits, and incentives (e.g. ending the exemption from energy taxation on intra-EU flights). Investors also face short-term demand volatility (going sharply up and down with COVID waves and ad hoc travel restrictions) and difficulties in anticipating long-term changes, such as the future share of ecological tourism.

Lastly, foreign direct investment tends to focus on a few sectors only, such as travel and other tourism services technology, hotels, and short-term car rentals.<sup>208</sup>

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<sup>202</sup> [SWD\(2020\) 98 final](#), p. 41.

<sup>203</sup> "from US\$ 986 billion in 2019 of total global investment to US\$ 693 billion" WTTC, *Investing in travel & tourism*, Sept 2021, p.2.

<sup>204</sup> According to the 17th of Nov 2021 "Europe Hotel Construction Pipeline Trend Report" from Lodging Econometrics, at the close of Q3 2021, hotel projects under construction were down by 6% (870 projects) and rooms by 5% (144,463 rooms) YOY. Projects scheduled to start construction in the next 12 months were down 7% by projects and 5% by rooms YOY. However projects in the early planning stage are up 15% and 22% respectively, YOY.

<sup>205</sup> [Renewed sustainable finance strategy and implementation of the action plan on financing sustainable growth | European Commission \(europa.eu\)](#)

<sup>206</sup> <https://www.eib.org/en/products/index.htm> ;

<https://www.eib.org/en/projects/sectors/transport/index.htm>

<sup>207</sup> [SURE](#), [CRII+](#), [REACT-EU](#) and the [State Aid Temporary Framework](#), which has been extended until June 2022. Indirect support has also be provided by, for instance, changes in EU legislation to provide temporary relief to the aviation sector.

<sup>208</sup> UNWTO (2020), 'Enabling Frameworks for Tourism Investment - Drivers and Challenges shaping Investments in Tourism', pp.19 and following. It is traditionally much more limited in travel infrastructures (railway, airports, etc., where investors cannot acquire ownership or a significant influence) and in less lucrative sectors.

**Table 2 : EU funding programmes relevant for tourism**

	<b>EU funding programmes 2021-27 covered by the Guide on EU funding for tourism</b>	<b>MFF</b>	<b>NGEU</b>	<b>Total in billion EUR*</b>
1	Recovery and Resilience Facility		723,8	723,8
2	European Regional Development Fund (ERDF) and Cohesion Fund	274,0		274,0
3	European Social Fund Plus (ESF+)	99,3		99,3
4	European Agricultural Fund for Rural Development (EAFRD)	87,4	8,1	95,5
5	European Maritime, Fisheries and Aquaculture Fund (EMFAF)	6,1		6,1
6	Programme for environment and climate action (LIFE)	5,4		5,4
7	Horizon Europe	86,1	5,4	95,5
8	Creative Europe Programme	1,8		2,5
9	Erasmus+	24,6		26,5
10	Just Transition Fund (JTF)	8,5	10,9	19,3
11	Digital Europe programme	7,6		7,6
12	Single Market Programme (SMP)	4,2		4,2
13	InvestEU Fund	3,1	6,1	10,3
14	REACT-EU		50,6	50,6
15	European Globalisation Adjustment Fund (EGF)			1,5
	<b>Total budget in billion EUR</b>			<b>1.422,2</b>

\* all amounts rounded; for some programmes the total includes additional reinforcements  
Sources: DG EMPL (2021): European Globalisation Adjustment Fund for Displaced Workers (EGF)

### **EU funding sources for tourism**

There is support available to many tourism sectors and tourism operators under altogether 15 different EU funding programmes. Together they provide more comprehensive support at EU level than would be possible under a single tourism-specific funding programme. Table 2 provides a list of these 15 EU programmes.

To help tourism stakeholders find funding under the available EU programmes, DG GROW publishes a [Guide on EU funding for tourism](#). This guide gives examples of projects that have received funding under different programmes.

### **EU technical support to transform the tourism ecosystem**

The Commission supports Member States upon request in developing and implementing reforms for a sustainable, resilient and digital tourism through the Technical Support Instrument. In 2022, the Technical Support Instrument will support several Member States in promoting better data governance, developing tools for greening and digitalising the tourism industry, and improving destination management.

### **Programmes managed at national and regional levels**

Cohesion policy funds<sup>209</sup> support regions and cities in the European Union with the aim of providing support for job creation, business competitiveness, economic growth, sustainable development, and improving citizens' quality of life. This support is provided under the shared management method, where Member States, regional and local authorities are responsible for implementing the Funds, setting priorities based on the identified needs and in compliance with the set conditions. This enables the national, regional and local authorities to set up schemes that meet the specific needs of the local area, with funding from the EU budget alongside national and private funding.

In the programming period 2021-2027, cohesion policy funds, especially the European Regional Development Fund, continue to provide plenty of scope under the policy objectives to strengthen the foundations of a more resilient and sustainable tourism ecosystem. For example, the Fund promotes investment in digital solutions, in optimal and sustainable uses of environmental resources, the diversification of the tourism supply, and for cross-border cooperation in the field of sustainable tourism. As a new feature, a new specific objective under the European Regional Development Fund has been added.

<sup>209</sup> [Cohesion Policy 2021-2027 - Regional Policy - European Commission \(europa.eu\)](#)

The aim is to promote sustainable tourism in enhancing economic development, social inclusion and social innovation, acknowledging the transformative potential of the tourism sector in addressing socioeconomic challenges and taking into account green and digital transformation and resilience needs in the target area. There is also support available for sustainable tourism under integrated local development strategies based on the needs and potential of the local areas.

Support is also available to tourism operators and SMEs under the national recovery and resilience plans, which provide specific support for the green transition and digital transition for SMEs. Furthermore, 16 national plans have specific tourism-related elements. Over half of their planned investments (56%) aim to strengthen the resilience and competitiveness of the tourism ecosystem, a third (32%) of investment will be allocated to increasing sustainability, and 12% will support digitalisation. In addition, measures on lifelong learning, vocational education and reskilling of the workforce will also benefit tourism companies and their workforce.

Under the single market programme, the Commission, along with the Member States, co-funds the European Consumer Centre Network<sup>210</sup>, which provides advice and assistance to tourists on their consumer rights when travelling across borders in the EU.

### ***SME-focused support mechanisms***

Under the single market programme, the Commission is supporting specific actions for SMEs under its SME pillar. Annual calls for projects organise thematic support for SMEs in different Member States, comprising both direct financial support and technical assistance. The measures launched in 2021 to support the digitalisation of SMEs<sup>211</sup> and others due to be launched in 2022 will help boost the COVID-19 recovery by stimulating growth in sustainable tourism<sup>212</sup>, including engagement with environmental schemes and product environmental footprint assessments.

In addition to funding programmes, other support mechanisms for SMEs and companies benefit also those working in tourism. These resources are easily accessible for all and provide direct advice and opportunities to connect with peers and experts:

- **Enterprise Europe Network (EEN)**<sup>213</sup> provides support for all SMEs on innovation, intellectual property rights and digitalisation. They also have sustainability advisors from 2022 onwards. Through the EEN, tourism SMEs can locate local contact points, which can give advice and provide links to experts and resources.
- **European Cluster Collaboration Platform**<sup>214</sup> provide support for industry clusters and include several clusters relating to tourism. They provide tools to find supporting partnerships on regional, national and European level.
- **European Digital Innovation Hubs**<sup>215</sup> provide innovation services, such as financing advice, training, and skills development that are needed for a successful digital transformation and digital innovation.
- **European Innovation Council**<sup>216</sup> scheme EIC accelerator provides financial support, coaching, mentoring, and access to investors and corporates to SMEs.
- **Access to EU finance**<sup>217</sup> at YourEurope portal helps SMEs to find information on loans and venture capital supported by the European Union.
- **European Investment Fund**<sup>218</sup> support European SMEs by improving their access to finance through a wide range of selected financial intermediaries.

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<sup>210</sup> [European Consumer Centres Network - ECC Net | European Commission \(europa.eu\)](https://ec.europa.eu/economy_finance/european-consumer-centre-network)

<sup>211</sup> [https://ec.europa.eu/research/participants/data/ref/other\\_eu\\_prog/cosme/wp-call/call-fiche\\_cos-tourinn-2020-3-04\\_en.pdf](https://ec.europa.eu/research/participants/data/ref/other_eu_prog/cosme/wp-call/call-fiche_cos-tourinn-2020-3-04_en.pdf)

<sup>212</sup> [COVID-19 Recovery Through Sustainable Tourism Growth and SME Support \(SMP-COSME-2021-TOURSME\) \(europa.eu\)](https://ec.europa.eu/economy_finance/covid-19-recovery-through-sustainable-tourism-growth-and-sme-support-smp-cosme-2021-toursme)

<sup>213</sup> [Enterprise Europe Network \(europa.eu\)](https://www.een.europa.eu/)

<sup>214</sup> [Homepage | European Cluster Collaboration Platform EDIHs | Shaping Europe's digital future \(europa.eu\)](https://ec.europa.eu/economy_finance/european-cluster-collaboration-platform)

<sup>215</sup> [EIC Accelerator \(europa.eu\)](https://ec.europa.eu/economy_finance/eic-accelerator)

<sup>217</sup> [Access to finance - Your Europe \(europa.eu\)](https://www.youreurope.eu/)

<sup>218</sup> <https://www.eif.org>

**Topic 27: Support visibility of funding opportunities for tourism actors**

- Enhancing the 'Guide on EU funding for tourism' by providing information on recently funded projects and upcoming calls
- Providing a one-stop-shop that links to key support resources for tourism SMEs and funding opportunities at European, national and regional levels
- Ensuring effective communication on the direct SME support provided under COSME/SMP actions in the Member States

## **MONITORING AND CO-IMPLEMENTATION**

### ***Launching a co-implementation process***

The co-creation process with stakeholders has shown how relevant it is to work together to support the green and digital transition, recover from the pandemic and increase the long-term resilience and sustainability of the ecosystem. Co-operation must not stop when the transition pathway is published. It should continue with a co-implementation process where co-ownership (in the form of commitments and pledges) is accompanied with structures and participatory processes to help feed in continuous support and regular assessment of the transition measures and targets.

The co-implementation process will start by disseminating the transition pathway for Tourism to all involved in the tourism ecosystem and encouraging them to present their commitments to co-implement the transition pathway for tourism.

- Stakeholders will be invited to present their commitments by pledging to take action on specific measures and/or targets set out in the transition pathway. These commitments and their yearly follow-up will be published online. The commitments are expected to include measurable targets, and the green/sustainability commitments should be third-party validated and underpinned by EMAS, EU ecolabel, or PEF/OEF.
- Stakeholders will be invited to express their interest in participating in task forces to support and track progress on the key dimensions (green, digital, resilience) of the transition pathway.
- Stakeholders will also be invited to benefit from the synergies between the objectives of the transition pathway for tourism and international initiatives such as the Glasgow Declaration<sup>219</sup>, the One Planet network<sup>220</sup>, Destination 2050<sup>221</sup>, Pact for Skills in Tourism<sup>222</sup> and other international and European initiatives

when planning their pledges, targets and progress assessment.

### ***Engagement and support by Member States***

The EU Member States have been part of all phases of the co-creation process, including specific consultation meetings. Their support for the transition is crucial, to guide and provide support at regional and local levels, mindful of the specific needs of each local area.

The Commission will continue working with Member States experts with the aim of agreeing a set of measures and a multiannual work plan, based on the actions outlined in the transition pathway.

### ***Cross-policy coordination***

As described in this document, the tourism ecosystem is interlinked with several other ecosystems and their policies. For this reason, it is important to ensure that the process of co-implementing the tourism transition pathway takes into account progress made by other ecosystems and developments in other EU policies. DG GROW will help coordinate with other Commission departments to ensure that the co-implementation process takes into account the progress made by other ecosystems and developments in other EU policies.

The stakeholders have highlighted that they also consider policy coordination necessary at Member State level. Such coordination is strongly encouraged, and therefore the Council Working Party on Tourism could consider joint coordination meetings with other working parties if specific needs are recognised.

### ***Technical support via a collaborative online platform***

As recognised in several sections of this report and related measures, there is a need for a technical platform that provides a central point of support for stakeholders. Launching such a platform will be a key task for DG GROW in 2022. This platform will support several of the measures identified in the transition pathway and provide space for both structured and unstructured contacts

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<sup>219</sup> [HOME | Glasgow Food and Climate Declaration \(glasgowdeclaration.org\)](https://glasgowdeclaration.org)

<sup>220</sup> [Home | One Planet network](https://oneplanetnetwork.eu)

<sup>221</sup> [Home \(destination2050.eu\)](https://destination2050.eu)

<sup>222</sup> <https://ec.europa.eu/social/BlobServlet?docId=25214&langId=en>



and learning opportunities between stakeholders.

This technical platform will provide a key support for the co-implementation process of the transition pathway. It will provide resources and a working space for the task forces, host structured discussions between stakeholders, enable information exchange and peer support for specific measures, and provide a survey function for stakeholders on their challenges and achievements in making the transition happen.

The platform would also provide links to observatories and best practices in areas relevant to the transition actions to more green, digital and resilient tourism, including:

- Eltis Urban mobility observatory: <https://www.eltis.org/>
- Circular Economy Stakeholder platform: <https://circulareconomy.europa.eu/platform/>
- EU Food Loss and Waste prevention hub: [https://ec.europa.eu/food/safety/food\\_waste/eu-food-loss-waste-prevention-hub/](https://ec.europa.eu/food/safety/food_waste/eu-food-loss-waste-prevention-hub/)
- Smart tourism capitals best practices: [https://smart-tourism-capital.ec.europa.eu/best-practices\\_en](https://smart-tourism-capital.ec.europa.eu/best-practices_en)
- Tourism business portal: [https://ec.europa.eu/growth/sectors/tourism/business-portal\\_en](https://ec.europa.eu/growth/sectors/tourism/business-portal_en)

By ensuring good linkages with existing fora, the co-implementation process of the transition pathway will ensure that there will be a good optimisation of resources, without duplicating efforts.

### ***Assessing and following progress along the pathway***

The follow-up of the transition pathway should be a collaborative process, linked with support for co-implementation. The specific approach will be discussed and agreed with the stakeholders participating in the co-implementation, but the initial plan includes:

- Inviting stakeholders to form three task forces: Green transition, Digital Transition, and Resilience. The measures set out in the transition pathway will then be allocated to these task forces to follow and guide. These task forces would self-organise their work, and with the support of the Commission prepare

each year a summary of the progress made on tourism transition pathway actions.

- Distributing an annual survey for stakeholders who have made specific commitments to implement transition pathway measures and targets. The updated status of commitments would be published online on the collaboration platform to inform and encourage other stakeholders.
- Organising a yearly (hybrid) plenary meeting for all stakeholders taking part in the transition pathway co-implementation, which would prepare yearly conclusions of progress on the transition pathway for tourism. This meeting would feature a presentation by the three task forces of their assessment of progress made over the year for joint discussion, a summary of the survey results of progress on the commitments and an annual update of the EU Tourism Dashboard indicators on green, digital and resilience dimensions on EU tourism.

In addition to continuous co-implementation, support and follow-up work carried out by the task forces and active stakeholders with the support of the Commission, progress could be assessed with specific stock taking studies to be launched in 2023, 2025 and 2030, guided by the task forces. These studies will provide a structured analysis of all measures and present recommendations if any needs are identified to revise the measures, targets or support mechanisms.

The follow-up to the Member States initiatives and to the EU Agenda for Tourism would be supported by the Tourism Advisory Committee. The Commission will also keep the Council Working Party on Tourism informed of progress on co-implementing the tourism transition pathway. The Industrial Forum oversees the transition pathways of all industrial ecosystems and would also be regularly updated on progress on the transition pathway for tourism.

Figure 2: Collaboration platform for the tourism transition pathway co-implementation



**ANNEX 1: TABLE OF ACTIONS, ACTORS AND OUTPUTS**

Topic	Actions	Key actors	Output	Source
<b>REGULATION AND PUBLIC GOVERNANCE</b>				
<b>Topic 1: Fair measures for short-term rentals (STR)</b>	<p>Strengthening the EU framework for short-term rentals to enhance transparency and improve market access</p> <p>Implementing STR policies which support balanced, fair and transparent short-term rental services</p>	<p>National, regional and local authorities</p> <p>European Commission</p>	<p>A well-flourishing and transparent STR market in the EU, creating opportunities and contributing to tourism ecosystem in a fully sustainable manner</p>	<p>Consultation report<sup>223</sup> - Section 1.3</p>
<b>Topic 2: Regulatory support for multimodal travelling</b>	<p>Reinforcing the EU framework to facilitate multimodal journey planning and ticketing through digital services</p>	<p>European Commission</p> <p>National, regional and local authorities</p> <p>Tourism industry</p>	<p>Increased opportunities for visitors to make door-to-door travel arrangements to both urban and rural EU destinations</p>	<p>Consultation report – Section 2.1</p>
<b>Topic 3: Improving statistics and indicators for tourism</b>	<p>Revising harmonised data collection rules on tourism statistics to include elements on economic, social and environmental sustainability</p> <p>Improving access to data for producing official statistics</p> <p>Including key sustainability indicators on destination level to the harmonised tourism data collection framework</p>	<p>European statistical system (ESS)</p> <p>European Commission</p> <p>Tourism industry</p> <p>Regional and local authorities</p> <p>Destination management organisations</p>	<p>Revised EU framework for tourism statistics which includes indicators on economic, environmental and social impacts of tourism by 2030</p> <p>Official statistics production benefiting also from privately collected data, in compliance with data protection rules and legitimate commercial interests.</p>	<p>Consultation report – Sections 1.2 and 1.4</p> <p>Member State consultations</p>

<sup>223</sup> [Stakeholder consultation report](#)

Topic	Actions	Key actors	Output	Source
	Implementing the EU Tourism Dashboard to support follow-up of environmental, digital and socio-economic aspects of tourism		EU Tourism Dashboard publicly available and used	
<b>Topic 4: Comprehensive tourism strategies development or update</b>	<p>Developing comprehensive national or regional strategies taking account of economic, environmental and social sustainability of tourism</p> <p>Guidance and best practice exchange for strategy development on national, regional and local level</p>	<p>National, regional and local authorities</p> <p>Tourism industry</p> <p>European Commission</p>	<p>All Member States or their key tourism regions to have comprehensive tourism strategies by 2025</p> <p>Best practice exchange events and resources</p>	<p>Consultation report – Sections 1.1 and 1.4</p> <p>Member State consultations</p>
<b>Topic 5: Collaborative governance of tourism destinations</b>	<p>Establishing collaborative and data-supported destination management models</p> <p>Providing awards for smart destination management (Smart Tourism Capital)</p> <p>Studying and sharing best practice on destination management</p>	<p>Destination management organisations</p> <p>Regional and local authorities</p> <p>Tourism industry</p> <p>European Commission</p> <p>Tourists</p>	<p>All publicly funded destination marketing and management organisations (DMMOs) support collaborative governance which includes public and private stakeholders, residents as well as visitors</p> <p>Results and recommendations of a study on DMMO management models in the EU</p>	<p>Consultation report – Section 1.4</p>
<b>GREEN AND DIGITAL TRANSITION</b>				
<b>Topic 6: Sustainable mobility</b>	<p>Passenger transport companies to develop greenhouse gas (GHG) reduction plans in line with the Climate Law goals</p>	<p>Tourism industry</p> <p>National, regional and local authorities</p> <p>Tourists<sup>224</sup></p>	<p>Commitments and action plans of passenger transport companies</p>	<p>Consultation report – Section 2.1</p>

<sup>224</sup> [Eurobarometer 499](#) showed that a significant share of EU citizens (36%) are ready to change their travel habits to be more sustainable by choosing transport options based on ecological impact

Topic	Actions	Key actors	Output	Source
	<p>Including the visitor perspective in sustainable mobility plans of cities and regions, even in smaller destinations</p> <p>Improving the appeal of railways for visitors</p>		<p>Sustainable urban mobility plans, which include the visitor perspective</p> <p>Doubling high-speed rail traffic by 2030</p>	
<b>Topic 7: Circularity of tourism services</b>	<p>Developing the use of locally supplied ingredients with low environmental footprint to reduce the environmental impact of food services</p> <p>Reducing food waste in the hospitality industry</p> <p>Reducing and separating overall waste of tourism services</p> <p>Increasing water efficiency, reducing water stress and pollution, and improving sanitation</p>	<p>Tourism industry National, regional and local authorities Destination management organisations Tourists<sup>225</sup></p>	<p>Tourism/hospitality organisations to reduce food waste following EU-wide targets by 2030</p> <p>Halved the amount of non-recycled waste by 2030</p> <p>Reward in 2024 the cities reporting most progress over 2021-2023 in reducing air, water and soil pollution</p>	<p>Consultation report – Sections 2.3 and 2.4</p>
<b>Topic 8: Green transition of tourism companies and SMEs</b>	<p>Tourism companies, including SMEs, to register to EMAS</p> <p>Tourism accommodations, including SMEs to apply for the EU Ecolabel or other EN ISO 14024 type I ecolabels or equivalent voluntary labels, which are independent, multi-criteria based and third party verified</p>	<p>SMEs, Tourism industry National, regional and local authorities European Commission Tourists<sup>226</sup></p>	<p>Increased number of EMAS registered tourism organisations</p> <p>Increased number of EU Ecolabel tourism services or accommodations awarded with other EN ISO 14024 type I ecolabels or equivalent voluntary labels which are</p>	<p>Consultation report – Sections 2.1, 2.2, 2.3, 2.4 and 2.5</p>

<sup>225</sup> [Eurobarometer 499](#) showed that a large share of EU citizens (55%) are ready to change their travel habits to be more sustainable by consuming more locally sourced products

<sup>226</sup> [Eurobarometer 499](#) showed that almost half of EU citizens (48%) are ready to change their travel habits to be more sustainable by reducing waste while on holiday. 35% would be ready to reduce water usage on holiday, and same share (35%) would be ready to pay more to protect the natural environment

Topic	Actions	Key actors	Output	Source
	<p>Tourism operators to use relevant EU Green public procurement (GPP) criteria where applicable</p> <p>Capacity-building programmes, technical and financial assistance for SMEs to engage in environmentally friendly practices and schemes</p>		<p>independent, multi-criteria based and third party verified</p> <p>Increased use of relevant EU GPP criteria in purchasing tourism ecosystem services</p> <p>Increased involvement of SMEs in ecological certification schemes</p>	
<p><b>Topic 9: Data-driven tourism services</b></p>	<p>Stakeholder cooperation to agree common practices (Code of Conduct) and to actively share tourism-related data in a European Tourism Data Space</p> <p>Increasing use of data sharing in personalised tourism services and destination management, monitoring and service provision, including the creation of new platforms among SMEs</p> <p>Use of artificial intelligence and data-based innovation, such as local digital twins for predictive planning to accurately meet demand and increase resource efficiency of services</p>	<p>Tourism industry, SMEs Destination management organisations Tourists</p>	<p>Code of Conduct for data sharing to be agreed by stakeholders by 2022</p> <p>Increased offer of personalised tourism services and take-up of data-driven destination management tools</p>	<p>Consultation report – Sections 3.1 and 3.4</p>
<p><b>Topic 10: Improving the availability of online information on tourism offer</b></p>	<p>Improving the online availability of validated information on sustainable, accessible, or specifically targeted tourism offers</p> <p>Developing partnerships with on-line portals and booking platforms to provide more visibility to certified accommodation providers</p>	<p>Tourism industry, SMEs European Consumer Centres network Destination management organisations</p>	<p>Improved perceptions of EU citizens on the availability of trustworthy information on tourism services and characteristics</p>	<p>Consultation report – Section 3.2</p>

Topic	Actions	Key actors	Output	Source
	Ensuring information is available on consumer rights and dispute resolution mechanisms for tourists via the European Consumer Centre Network's digital channels			
<b>Topic 11: Easily accessible best practice, peer learning and networking for SMEs</b>	Establishing a collaboration platform for tourism SMEs and destinations that supports their access to information, specific tools, best practice and knowledge sharing opportunities to support their engagement in twin transition	European Commission SMEs, tourism industry Destination management organisations	Platform to be launched by 2023	Consultation report, many sections
<b>Topic 12: Research and innovation projects and pilots on circular and climate friendly tourism</b>	Tourism stakeholders engaging in public-private co-operation to prepare research proposals for funding calls that accommodate circular tourism-related R&I projects and pilots  Developing models and transferable practices for sustainable tourism  Establishing large-scale pilots on sustainable tourism, e.g. on islands and remote regions, including the outermost regions	Public and private tourism organisations Universities and research institutes Destination management organisations National, regional and local authorities	Validated and transferable circular and climate-friendly tourism models for different implementation levels	Consultation report - Chapter 2
<b>Topic 13: Promoting the use of the PEF and OEF methodology and the development sectorial category rules for the tourism ecosystem</b>	Supporting the uptake of PEF/OEF methods in tourism industries to collect baseline data for sectoral category rules development  Developing category rules for typical tourism products and services taking into account different tourism contexts (e.g. remote locations)  Developing tools to support tourism companies to make PEF/OEF assessments of their products and services	Tourism industry Universities and research institutes European Commission	Common environmental benchmarks exist for key tourism products and services, which are used by public and private organisations	Consultation report – Section 2.5

Topic	Actions	Key actors	Output	Source
<b>Topic 14: Technical implementation for tourism data space</b>	Stakeholders to implement a preparatory action for tourism data space, considering interoperability with all European data spaces and alignment with the Data Act	Tourism industry Universities and research institutes	Results of the coordination and support action to be launched in 2022 under Digital Europe programme	Consultation report – Section 3.1
<b>Topic 15: R&amp;I for digital tools and services in tourism</b>	Data-driven destination management models and mechanisms  Innovative tourism services using advanced technologies (virtual reality, augmented reality, AI) and digitised cultural heritage	Tourism industry Universities and research institutes Destination management organisations	Solutions for data-driven local destination management to monitor carrying capacity and wellbeing  Pilot services to enhance tourism experiences through extended and augmented reality, big data and AI	Consultation report – Sections 3.3 and 3.4
<b>Topic 16: Support for digitalisation of tourism SMEs and destinations</b>	Raising awareness of tourism SMEs on the benefits of digitalisation and on existing European, national and regional digitalisation programmes for SMEs  Developing a searchable inventory on existing transferable digital tools and practices for SMEs and destinations  Establishing a community of practice and a shared toolbox for data-driven destination management	SMEs, Tourism industry National, regional and local authorities Destination management organisations European Commission	90% of tourism SMEs have reached a basic level of digital intensity by 2030 and participate in the tourism digital value chain  Online inventory of transferable tools and practices published by 2023  Community of practice and toolbox for data management in destinations by 2023	Consultation report – Sections 3.3, 3.4 and 3.5
<b>RESILIENCE</b>				
<b>Topic 17: Seamless cross-border travelling</b>	Digitalising of Schengen visa procedures for non-EU nationals	European Commission Member States	The Commission will presents two proposals: (i) a proposal for a Regulation on the digitalisation of the visa procedures in 2022; (ii) a proposal for a Regulation	Member State consultations










Topic	Actions	Key actors	Output	Source
	Digitalising travel documents for EU citizens for improved and faster border processes		on the digitalisation of travel documents and facilitation of travel in 2023	
<b>Topic 18: Coordinated management and updated information on travelling</b>	<p>Implementing and extending the EU DCC framework as needed</p> <p>EU Member States to provide up-to-date information on their travel rules via 'Re-Open EU'</p> <p>Drawing lessons from COVID-19 to better respond to future exceptional events</p>	Member States European Commission	<p>Up-to-date effectively working EU DCC framework</p> <p>Up-to-date 'Re-Open EU'</p> <p>Study results on the lessons learnt from COVID-19 by 2023</p>	Member State consultations
<b>Topic 19: Awareness raising on skills needs for twin transition in tourism</b>	Preparing information materials on skills needs for different types of tourism actors	EU Pact for skills partnership for tourism	Information brochure published in 2022	Consultation report – Section 5.1
<b>Topic 20: Awareness raising on changes in tourism demand and the opportunities of twin transition for tourism</b>	<p>Dissemination campaign on the tourism transition pathway to destination authorities, tourism management organisations and SMEs to promote the relevance of the actions linked with the twin transition and resilience</p> <p>Awareness-raising activities to increase the uptake and visibility of sustainability tools, as well as consumers' demand of sustainable options</p> <p>Supporting networking and best practice sharing by award-winning cities in Europe on smart tourism, culture, sustainability, innovation, accessibility and European heritage</p>	European Commission National and regional authorities Destination management organisations	<p>Dissemination activities on the tourism transition pathway in 2022</p> <p>Incorporation of information on sustainability schemes and labels in the EU supported tourism campaigns</p> <p>Best practice exchange and promotion events between award-winning cities</p>	Consultation report, many sections

Topic	Actions	Key actors	Output	Source
<p><b>Topic 21: Educational organisations to engage in developing and renewing tourism education</b></p>	<p>Incorporating new skills profiles in vocational education and training policy and curricula, through cooperation between education authorities, social partners and institutions for vocational and higher education</p> <p>Developing tourism curricula through cooperation partnerships with the support of Erasmus+ key action 2</p> <p>Developing skills and capacities of tourism education staff and students through Erasmus+ mobility opportunities for vocational and higher education</p>	<p>Vocational and higher education institutions EU Pact for skills partnership for tourism</p>	<p>New skills profiles included in vocational education and training curricula</p> <p>Erasmus+ partnerships established for mobility and capacity development in tourism education</p>	<p>Consultation report – Section 5.1 Member State consultations</p>
<p><b>Topic 22: Pact for skills in tourism</b></p>	<p>Establishing of national, regional and local skills partnerships in major EU tourism regions</p> <p>Engaging tourism companies, education providers, trade unions and other organisations to commit to jointly agreed training targets for their workforce</p> <p>Fast training courses, apprenticeship schemes and blended models for the unemployed and job seekers</p>	<p>National, regional and local authorities Tourism industry (Sectoral) social partners Education and training institutions</p>	<p>Regional and national skills partnerships established in all Member States</p> <p>By 2030, 80% of tourism workforce has participated in training</p>	<p>Consultation report – Section 5.1</p>
<p><b>Topic 23: One-stop-shop for learning opportunities for tourism SMEs</b></p>	<p>Providing a user-friendly digital access point for tourism SMEs on payable/free self-learning resources and updated announcements of upcoming training events from different providers.</p>	<p>EU Pact for skills partnership for tourism European Commission</p>	<p>Support through the stakeholder collaboration platform to be published by 2023</p>	<p>Consultation report – Section 5.1</p>

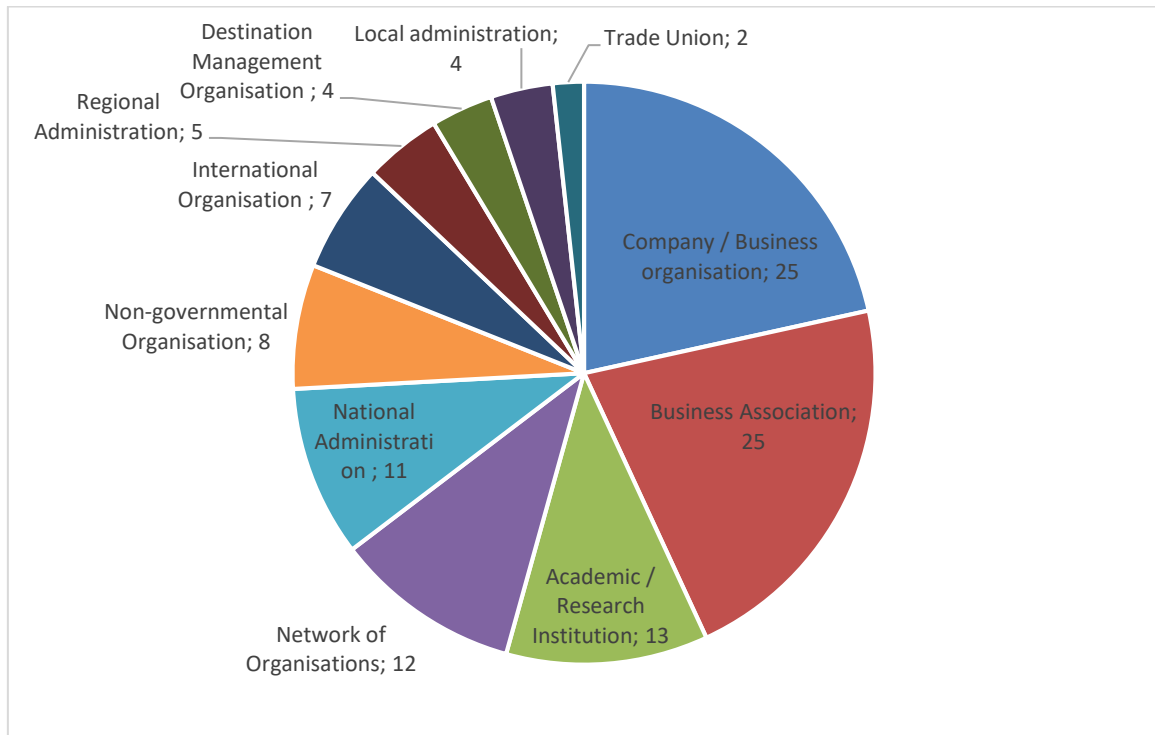
Topic	Actions	Key actors	Output	Source
	Providing an online space where tourism SMEs can connect with each other to share learning from one another			
<b>Topic 24: Fairness and equality in tourism jobs</b>	<p>Tourism companies to offer stable and decent employment, with fair and equal pay, full social security coverage, respect of workers' rights to organise and to bargain collectively, working contracts and gender equality</p> <p>Public tourism organisations to lead by example in employing fair employment practices</p> <p>Competent authorities to carry out inspections and controls on working conditions in the sector</p>	<p>Tourism industry</p> <p>Public tourism organisations</p> <p>Work councils, worker representations</p>	Reported approaches to support gender equality, fair pay and working conditions in tourism, in line with reporting obligations on environmental and social sustainability	Consultation report – Section 4.2
<b>Topic 25: Enhancing accessible tourism services</b>	<p>Raising awareness of the importance of accessibility in tourism</p> <p>Improving the supply and visibility of accessible tourism services</p> <p>Applying EU rules on accessible public procurement</p>	<p>National, regional and local authorities</p> <p>Destination management organisations</p> <p>Tourism industry, SMEs</p> <p>Organisations of persons with disabilities</p>	Increased offer and online access to information on accessible tourism services	Consultation report – Section 4.1
<b>Topic 26: Tourism services for visitors and residents alike</b>	<p>Diversifying and developing tourism services so that they benefit both residents and visitors</p> <p>Taking into account different types of customers, such as families or individuals, or people with different religious, spiritual or sexual orientations</p>	<p>SMEs, Tourism industry</p> <p>Destination management organisations</p> <p>Tourists and residents</p>	Increased variety and diversity of tourism offer which also supports links between residents and visitors, and authentic tourism experiences linked with the local culture	Consultation report – Sections 1.4 and 4.1
<b>FUNDING</b>				

Topic	Actions	Key actors	Output	Source
<p><b>Topic 27: Support visibility of funding opportunities for tourism actors</b></p>	<p>Enhancing the 'Guide on EU funding for tourism' by providing information on recently funded projects and upcoming calls</p> <p>Providing a one-stop-shop that links to key support resources and funding opportunities for tourism SMEs on European, national and regional level</p> <p>Ensuring effective communication on the direct SME support provided under COSME actions in the Member States</p>	<p>European Commission National and regional authorities</p>	<p>Supporting these through the stakeholder collaboration platform to be published by 2023</p>	<p>Consultation report, several sections; Member State consultations</p>

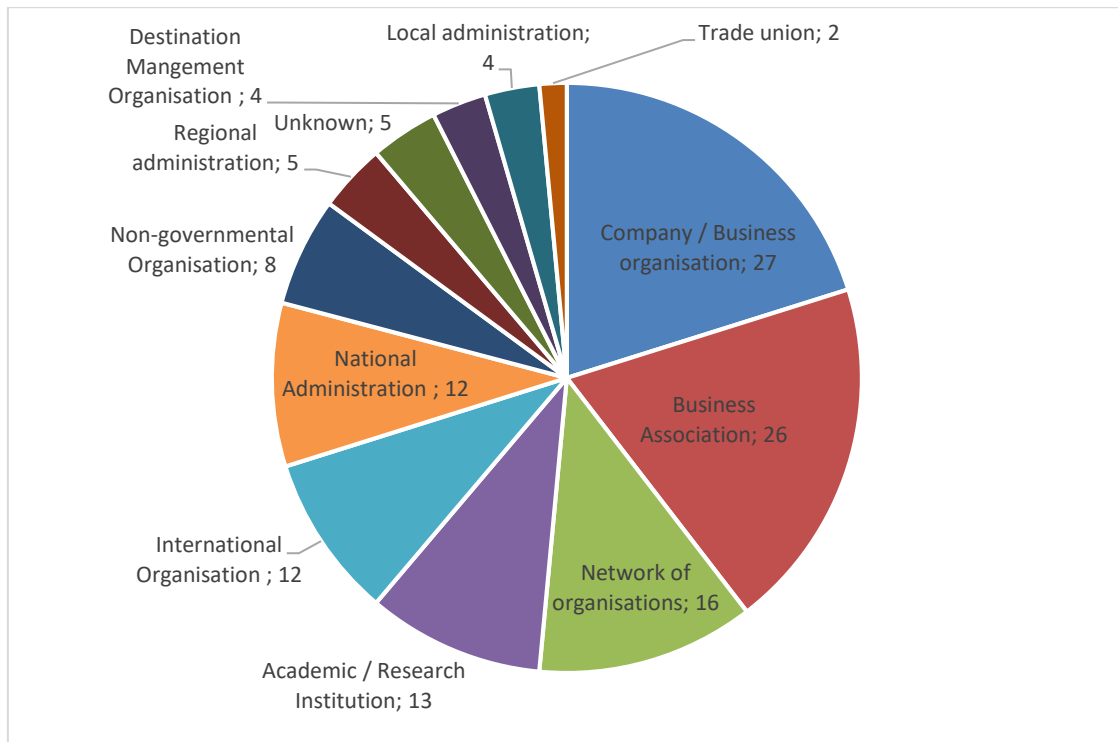
## ANNEX 2: TOURISM TRANSITION PATHWAY CO-CREATION PROCESS ELEMENTS

Process element	Implementation and timing in the tourism transition pathway
 <p><b>Staff Working Document on scenarios</b></p>	<p><b>21 June 2021:</b> SWD(2021) 164 final</p> <p><b>Objective:</b> Outlining recent developments, transition vision and scenarios of transition elements</p> <p><b>Key input elements:</b> Previous discussions with stakeholders, outputs of Tourism Convention 2020, recent policy documents with relevance for tourism ecosystem, feedback from other Commission services</p>
 <p><b>Online targeted stakeholder consultation</b></p>	<p><b>21 June 2021 – 15 September 2021</b> through EU survey tool</p> <ul style="list-style-type: none"> <li>182 responses online, 10 by email, respondents from 24 Member States, representing public and private organisations, including Member States and public administrations</li> </ul> <p><a href="#">Compilation of results</a> published on DG GROW website</p>
 <p><b>Meetings with stakeholders</b></p>	<ul style="list-style-type: none"> <li>5 – 8 October 12 workshops, in total <b>115</b> participants</li> <li>21-22 October 3 meetings, in total <b>90</b> participants</li> <li>15 December 2021 final feedback meeting, <b>129</b> participants</li> </ul> <p><a href="#">Workshop summary</a> published on DG GROW website</p> <p><a href="#">Stakeholder consultation report</a> on DG GROW website</p>
 <p><b>Meetings with Member States</b></p>	<ul style="list-style-type: none"> <li>2 TAC meetings with MS experts: 22 June, 13 Oct</li> <li>2 Working meetings with combined participation of TAC and Council working group: 10 November, 3 December 2021</li> <li>4 Meetings with the Council working group on Tourism: 9 July, 20 Oct, 10 Nov, 3 Dec</li> <li>Informal ministerial conference 16 November 2021</li> </ul>
 <p><b>EC inter-service consultations</b></p>	<p><b>2 times on staff working document:</b> informal consultation 1-3 June; formal consultation 9-15 June 2021</p> <p><b>2 times on stakeholder consultation results:</b> informal consultation 26-28 October; informal consultation 26 Nov - 7 December 2021</p> <p><b>1 time on policy report:</b> formal consultation 17-27 January 2022</p>
 <p><b>Industrial Forum</b></p>	<ul style="list-style-type: none"> <li>December 2021 consultation of IF Task Force 2 on the report on stakeholder consultation results</li> <li>January 2022 consultation of IF Task Force 2 on TTP policy report</li> </ul> <p><b>Industrial Forum blueprint matrix structure and questions</b> used as a basis to guide the structure and content of Transition pathway report</p>
 <p><b>DG GROW Policy report</b></p>	<p><b>January 2022</b> policy report to be published on DG GROW website and Publications Office website, with an OP publication identifier</p> <p><b>Objective:</b> Describe key elements, enablers and interlinkages to facilitate twin transition and enhance the resilience of tourism ecosystem</p> <p><b>Key input elements:</b> outputs from stakeholder consultations, Member states meetings and inter-service consultations</p>

**Distribution of respondent organisations in the online targeted stakeholder consultation**



**Distribution of participant organisations in stakeholder workshops**



**ANNEX 3: INDUSTRIAL FORUM BLUEPRINT BUILDING BLOCKS**

Industrial Forum blueprint building blocks	Corresponding sections in the report
Regulation and public governance	REGULATION AND PUBLIC GOVERNANCE
GREEN AND DIGITAL TRANSITION	GREEN AND DIGITAL TRANSITION
RESILIENCE	RESILIENCE
Sustainable competitiveness	<p>Green and Digital transition:</p> <ul style="list-style-type: none"> <li>• Synergies with other ecosystems</li> <li>• Meeting the demand for more sustainable tourism</li> <li>• Digitalisation of tourism services</li> </ul> <p>Resilience:</p> <ul style="list-style-type: none"> <li>• Europe as globally competitive destination</li> <li>• Resilience to disruptions</li> <li>• Rural and remote regions</li> <li>• Changing climate</li> </ul>
R&I, techniques and technological solutions	<p>Green and Digital transition:</p> <ul style="list-style-type: none"> <li>• R&amp;I and technologies</li> <li>• Barriers to taking up new solutions</li> </ul>
Infrastructure	<p>Green and Digital transition</p> <ul style="list-style-type: none"> <li>• Infrastructure needs to achieve the twin transition</li> </ul> <p>Resilience</p> <ul style="list-style-type: none"> <li>• Infrastructure</li> </ul>
Skills	<p>Green and Digital transition</p> <ul style="list-style-type: none"> <li>• Skills needs</li> </ul> <p>Resilience</p> <ul style="list-style-type: none"> <li>• Skills and workforce</li> </ul>
Social dimension	<p>Resilience</p> <ul style="list-style-type: none"> <li>• Social dimension</li> </ul>
Investments and funding	INVESTMENTS AND FUNDING

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