Sustainable tourism in Europe: Transition Pathway for Tourism and European Tourism Agenda 2030

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EU Tourism in figures

❖ **COVID-19 impact: 70% income lost (500mln EUR/day), 1 mln. jobs at risk (2020)**

❖ **4.5% direct EU gross value added, almost 7% overall**

❖ **19 mln. jobs, 1 mln. vacancies unfilled**

❖ **3.5 mln enterprises, 99 % - micro and SMEs**

❖ **2.7 billion nights spent in the EU, 57% domestic tourists (2022)**

❖ **2022: Europe received 46% of all international arrivals**

Europe remains most visited destination in the world, unique natural and cultural heritage

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Role of EU institutions

Treaty on the Functioning of the European Union: Article 195 - Tourism:

1. The Union shall **complement the action of the Member States** in the tourism sector, **in particular by promoting the competitiveness** of Union undertakings in that sector.
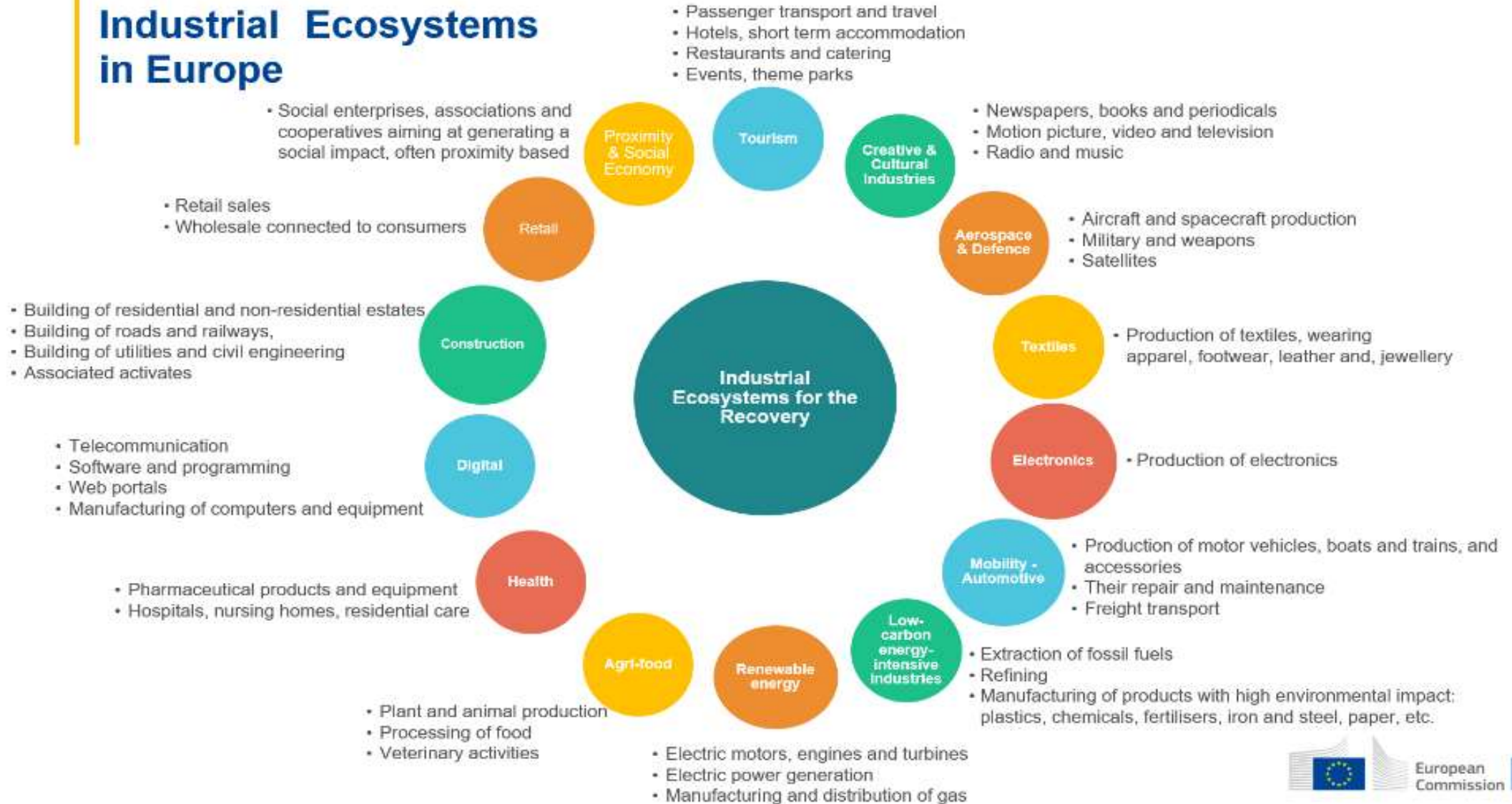
To that end, Union action shall be aimed at:

(a) encouraging the creation of **a favorable environment** for the development of undertakings in this sector;

(b) **promoting cooperation** between the Member States, particularly by the **exchange of good practice**.
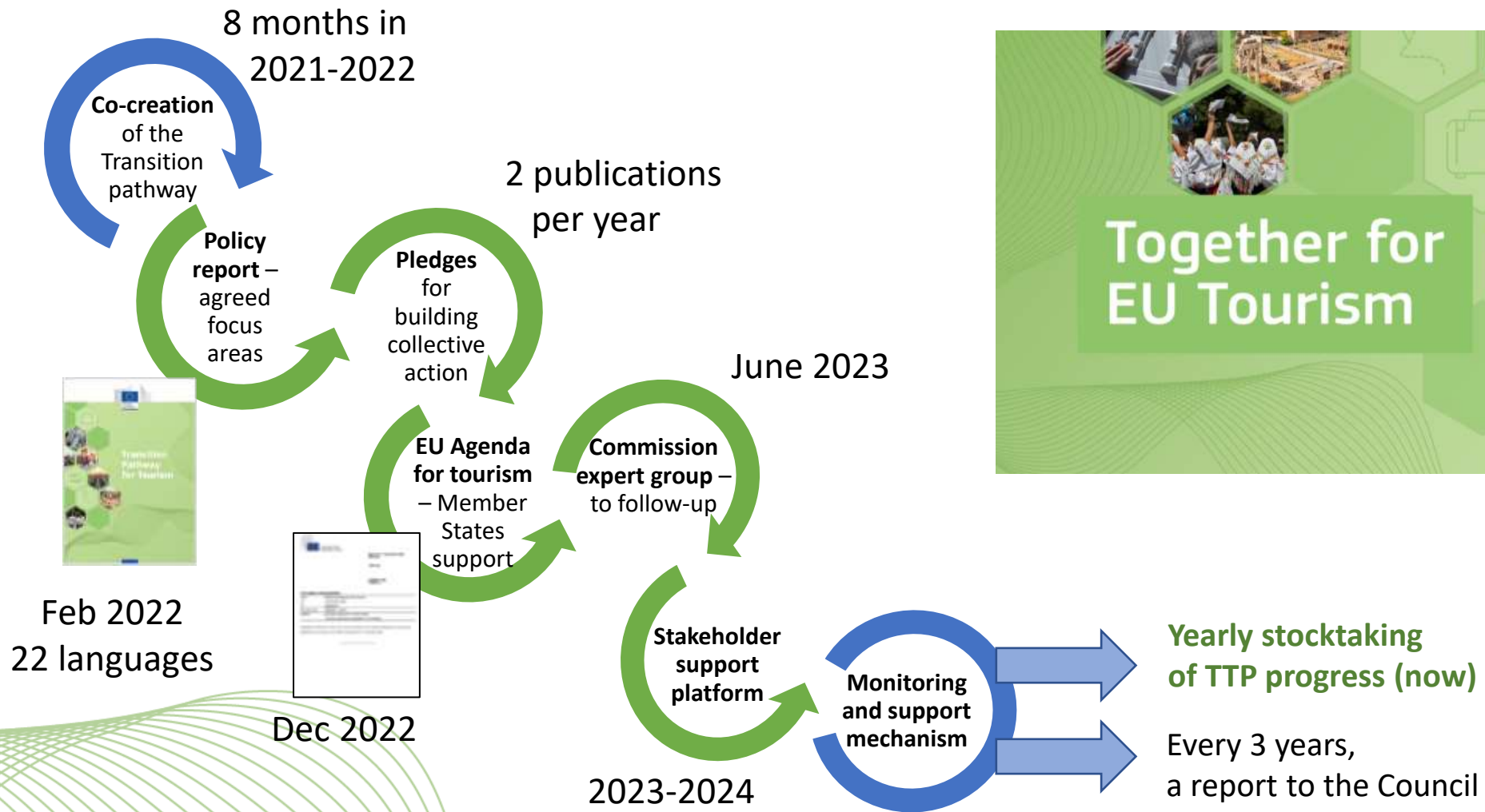
2. **The European Parliament and the Council**, acting in accordance with the ordinary legislative procedure, shall establish specific measures to complement actions within the Member States to achieve the objectives referred to in this Article, excluding any harmonization of the laws and regulations of the Member States.

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EU tourism ecosystem

Industrial Ecosystems in Europe

Industrial Ecosystems for the Recovery

- Passenger transport and travel
- Hotels, short term accommodation
- Restaurants and catering
- Events, theme parks

- Social enterprises, associations and cooperatives aiming at generating a social impact, often proximity based

- Newspapers, books and periodicals
- Motion picture, video and television
- Radio and music

- Retail sales
- Wholesale connected to consumers

- Aircraft and spacecraft production
- Military and weapons
- Satellites

- Building of residential and non-residential estates
- Building of roads and railways,
- Building of utilities and civil engineering
- Associated activates

- Production of textiles, wearing apparel, footwear, leather and, jewellery

- Telecommunication
- Software and programming
- Web portals
- Manufacturing of computers and equipment

- Production of electronics

- Production of motor vehicles, boats and trains, and accessories
- Their repair and maintenance
- Freight transport

- Pharmaceutical products and equipment
- Hospitals, nursing homes, residential care

- Extraction of fossil fuels
- Refining
- Manufacturing of products with high environmental impact: plastics, chemicals, fertilisers, iron and steel, paper, etc.

- Plant and animal production
- Processing of food
- Veterinary activities

- Electric motors, engines and turbines
- Electric power generation
- Manufacturing and distribution of gas

Circle labels: Proximity & Social Economy, Tourism, Creative & Cultural Industries, Aerospace & Defence, Retail, Textiles, Construction, Electronics, Digital, Mobility - Automotive, Health, Low-carbon energy-intensive industries, Agri-food, Renewable energy

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Transition pathway for tourism – building together

8 months in 2021-2022

Co-creation of the Transition pathway

Policy report – agreed focus areas

Pledges for building collective action

2 publications per year

EU Agenda for tourism – Member States support

Commission expert group – to follow-up

June 2023

Feb 2022
22 languages

Dec 2022

Stakeholder support platform

2023-2024

Monitoring and support mechanism

Yearly stocktaking of TTP progress (now)

Every 3 years, a report to the Council

Together for EU Tourism

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70 actions under five strategic areas, 27 topics

Digital transition

- Digitalisation of SMEs and destinations
- Interoperable data space for tourism
- R&I for digital tools and services
- Clear online information offer
- Data-driven tourism services

Green transition

- Circular tourism services
- Sustainable mobility
- Companies reducing environmental impacts
- R&I projects and pilots on sustainable tourism
- Experimenting environmental footprint methods for tourism

Stakeholder support

- Networking, Best practice sharing
- Awareness raising (skills needs, transition benefits)
- One-stop-shop to resources (skills, funding)

Policy & governance

- Collaborative and smart destination governance
- Comprehensive tourism strategies
- Expanding tourism indicators
- Multimodal travelling
- Short-term rentals

Skills & resilience

- Facilitating travelling (cross-border, coordinated rules sharing)
- Skills and education development
- Fair and good quality jobs
- Accessible tourism services
- Diversification of tourism services, including resident perspective

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Pledges & commitments – why important to participate?

Best practice examples

Leadership and visibility

Commitment to the EU Transition Pathway goals

Cooperation with other stakeholders and initiatives

Contribution to the Commission annual progress assessment
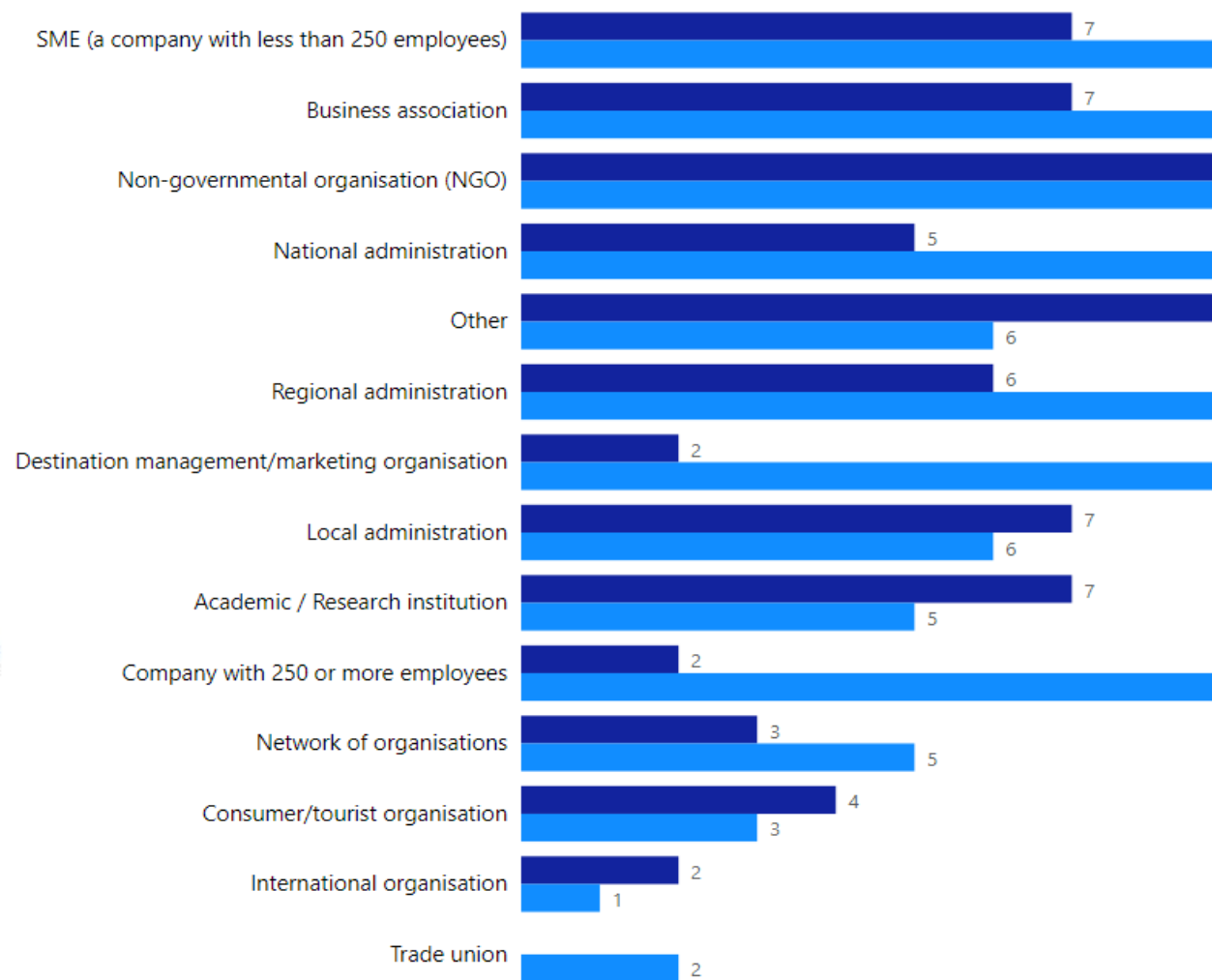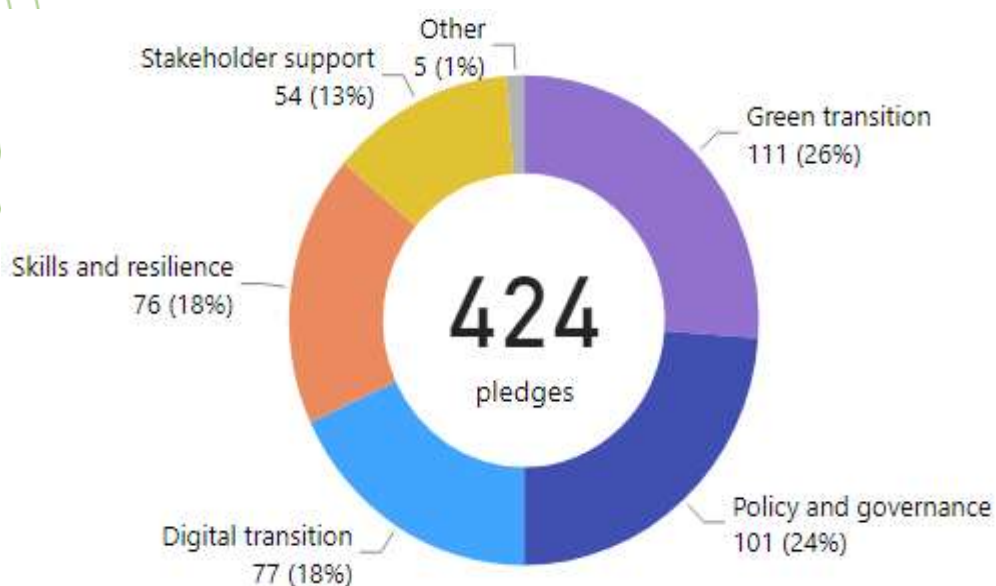
Identifying gaps where EU support is needed

Part of Together for *EU Tourism (T4T)* community

https://ec.europa.eu/eusurvey/runner/Together4EUTourism

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424 pledges from all types of organisations

Stakeholder support 54 (13%)

Other 5 (1%)

Green transition 111 (26%)

Skills and resilience 76 (18%)

424 pledges

Policy and governance 101 (24%)

Digital transition 77 (18%)

Organisation type	General commitment	With pledge
SME (a company with less than 250 employees)	7	
Business association	7	
Non-governmental organisation (NGO)		
National administration	5	
Other		6
Regional administration		6
Destination management/marketing organisation	2	
Local administration	7	6
Academic / Research institution	7	5
Company with 250 or more employees	2	
Network of organisations	3	5
Consumer/tourist organisation	4	3
International organisation	2	1
Trade union		2

● General commitment ● With pledge

Good practice in green mobility

Luxemburg: free public transport

Austria: supports transferable practices on circular and climate-friendly tourism. Initiatives over the years:
– **New Austrian Eco-Label for tourism destinations since January 2022:**
– **Yearly tourism mobility days and meetings of the tourism mobility platform** as well as of the working group on cycling tourism
– Climate and Energy Tourism Model Regions:
– Impulses for energy efficient and environmentally-friendly solutions in accommodation and gastronomy, e.g. online guidelines on energy efficiency (5th edition 2022)
– Tourism-specific studies on climate change

Ireland. The National Sustainable Mobility Policy sets out a **strategic framework to 2030 for active travel (walking and cycling) and public transport journeys** to help Ireland meet its climate obligations. The policy aims to deliver **at least 500,000 additional daily active travel and public transport journeys by 2030 and a 10% reduction in the number of km driven by fossil fueled cars**. It will make it easier for people to choose walking, cycling and use public transport daily instead of having to use a petrol or diesel car.

European Cyclists' Federation (ECF). Work with stakeholders across the continent to implement EuroVelo, the European cycle route network, so that it is a fully developed and high-quality network, which is well-connected to national, regional and local cycle route networks and other sustainable modes of transport, driving further increases in everyday cycling and cycling tourism. Target: **Increase in the % of the network implemented every year.**

Pays de la Loire Région, France. The aim is **to improve the transport offer and soft mobility for tourists, to offer travelers new experiences** (e.g.: without my car, by boat) and to **better distribute tourist flows in the region**.

By 2028: development of **intermodal solutions**, experimentation with solutions for **reaching a destination within 1km**, attractive **pricing policy**, **simplification of online sales**, etc**. Cycle tourism** is a crucial issue in the Pays de la Loire, and there will need to be more use the cycling continuity, from cycle tourism to everyday cycling. **By 2025:** Pays de la Loire will be the top French destination for cycle tourism. **By 2030: 100% of our destinations accessible by green means of transport** (soft or collective mobility) and 0% of our destinations exclusively accessible by (individual) car.

Regione Emilia-Romagna, Italy:

- Increase of **cycle paths** throughout the region.
- Installation of **electric charging stations** on the regional territory
- Completion of the **Metropolitan Railway System**
- MoU to complete the priority allotments of the **VENTO cycle route**, complete priority allotments of the **SOLE cycle route**
- **Construction of the Adriatic cycle route, intelligent mobility systems**
- Financing of projects promoted by local authorities for the construction of cycle paths and initiatives for bicycle/pedestrian mobility.

Target 1: +1000 km of cycle paths in 2025 compared to 2020 (1120 km). Target 2: + 2500 electric charging stations on the regional territory in 2025 compared to 2020 (708). Target 3: Metropolitan Railway System completed in 2025. Target 4: Finalization of the aforementioned Memoranda of Understanding by 2025. Target 5: Completion of the aforementioned allotments by 2025. Target 6: Completion of the aforementioned cycle route by 2025. Target 7: 800 smart appliances installed on board of the collective public means of transportation by 2025. Target 8: € 17,000,000.00 allocated to Local Authorities for the realization of the aforementioned projects by 2030.

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EU Tourism Dashboard

- **2nd release available online now!**

- **30+ updated and new indicators**
    - **Green**
    - **Digital**
    - **Socio-economic**
    - **Tourism demand and supply descriptors**

- Combines data from different sources (Eurostat, EEA, Eurocontrol, big data)

- Visual exploration at national and regional levels (down to NUTS 3)

- Possibility to make comparisons between destinations

- Generation of destination specific reports

Have a look at: https://tourism-dashboard.ec.europa.eu/

Funding sources for transition?

Guide on EU funding for tourism

- Tourism can be supported under **14 EU funding programmes**: https://ec.europa.eu/growth/sectors/tourism/funding-guide_en

- In 2022 also Technical Support Instrument by DG REFORM provided support for 7 MS

- National support under National recovery and resilience plans for 15 MS with specific action on tourism, also others may support tourism actors under e.g. SME support for green and digital transition

- Tourism actors can apply funding through different means
    - Organisations as part of consortia applying for EU level grants
    - Organisations applying individually or jointly funds managed at national and regional levels
    - SMEs applying for direct support organized through SMP funded actions with specific calls

- Currently open EU funding opportunities: https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-search

- There are also several other support mechanisms for SMEs which give technical assistance, training and support in finding funding options: European Enterprise Network, European Cluster Collaboration platform, Digital Innovation Hubs, EIC accelerator, Tourism Business Portal, …

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What is happening right now?

- **First stock-taking exercise of Transition pathway progress**
  - For the 2-year anniversary of the co-implementation phase, we take stock of implemented actions and achievements by:
    - The European Commission
    - The Member States
    - Stakeholders (especially pledges)
  - We analyse inputs and data
    - Across statistical sources (Eurostat, EU Tourism Dashboard)
    - Ecosystem monitoring study
    - From Member States and Stakeholders reporting
    - By analysing pledges content and reported results
    - From stakeholders consulting, including MS, EU institutions, EC policy services
  - First full report will be published early 2024 with yearly indicators

- **Establishing systematic support tools: T4T stakeholder support platform, T4T stakeholder expert working groups**

- **Current focus areas: Skills and staff shortages; Tourism data space** – essential enablers for a future-oriented transition of EU Tourism
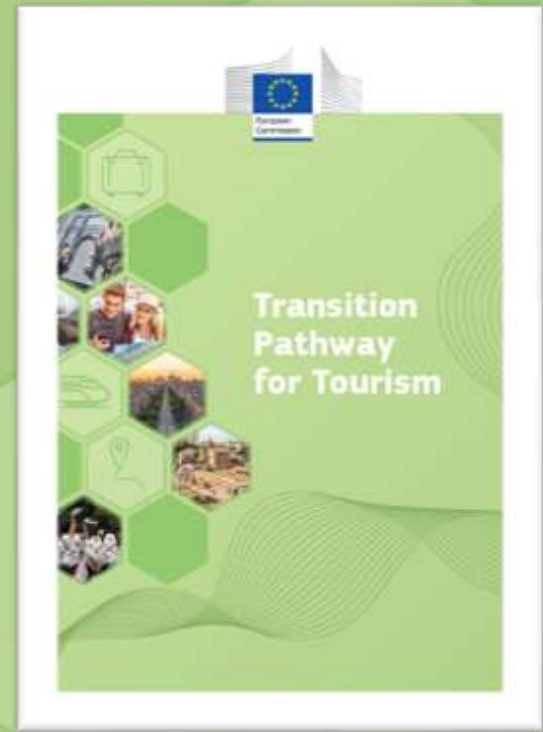
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Transition pathway: your role

- **Get informed :**
  - Read the TTP report and reflect its relevance to your activities – it gives a picture much broader than just a list of actions

- **Discuss and connect with others:**
  - Explore existing published pledges by similar type of actors, from your region, and/or regarding your areas of interest
  - Launch discussions on company/national/regional/local level on existing and potential synergies between TTP objectives and your own strategies for long-term development

- **Define your own path and target for action:**
  - Recognise relevant objectives and formulate concrete actions for reaching them
  - Embed your actions in respective strategies and practices with clear communication to all relevant actors (partners, workers, customers)

- **Collaborate:**
  - Share your work as your pledges demonstrating your leadership in the transition
  - Follow and participate in the Together for EU Tourism community activities

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EU-TOURISM-PATHWAY-2030@ec.europa.eu

- Transition pathway policy report in 22 languages
- Collection of stakeholder pledges and commitments
- Published pledges and commitments for the transition of EU tourism
- Tourism transition pathway co-creation (europa.eu)
- Guide on EU funding for tourism (europa.eu)
- EU Tourism Dashboard
- Council conclusions on EU Agenda for Tourism

Transition Pathway for Tourism

Together for EU Tourism