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Workshop Report
Intermediary Deliverable

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GRO-SME-20-C-081/c

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CO-CREATION OF A TRANSITION PATHWAY FOR TOURISM, FOR A MORE RESILIENT, INNOVATIVE AND SUSTAINABLE ECOSYSTEM.

Workshop Report

The European Commission adopted an updated New Industrial Strategy (May 2021) highlighting the need for Europe's industry to lead the green and digital transformations and to drive Europe's global competitiveness and strategic autonomy. The Commission proposed the co-creation of transition pathways with stakeholders as an essential collaborative tool for the transformation of industrial ecosystems. Tourism is the first industrial ecosystem to prepare such transition pathway for a green and digital transition, in order to reach in 2030 a resilient tourism ecosystem, which works effectively towards the commitments of the EU Green Deal and Digital Decade.

The present report is an intermediary result of an extensive co-creative consultation process with stakeholders across the tourism ecosystem and the EU Member States, a part of the transition pathway co-creation. The consultation process gathered evidence from 182 stakeholders that responded to a survey (June-September 2021), 115 stakeholders participating in a first round of 12 agenda setting workshops (October 2021), and over 90 of stakeholders returning for three workshops to validate the transition pathway topics, targets and actions.

It is important to note that the process is co-creative, with discussions focused on sharing different viewpoints and reaching consensus. The workshop outcomes are thus a collaborative result, hence it is not intended or possible to point to which specific stakeholder made which specific contribution.

The raw data collected from both workshop rounds can be found in Annex 1 (Mural outputs, workshop round 1) and Annex 2 (Voting results by stakeholders, workshop round 2). The voting process provides an indication and validation of the proposed topics, in terms of feasibility, future work done by stakeholders, and the perceived costs and benefits. The contributions represent the stakeholders' personal viewpoints. The results included in Annex are not statistically generalisable to the stakeholder groups they represented.

The report is structured into three themes, led by tourism experts for the **Green Transition** (Prof. Xavier Font and Dr. Gloria Crabolu), **Digital Transition** (Prof. Barbara Neuhofer), and the **Resilient Transition** (Prof. Ko Koens).

The consultation process has resulted in **27 transition pathway topics,** presented by theme. Each of these has proposed targets for 2030, and milestones in 2025 and 2022. The key benefits from working towards those targets are outlined, together with a series of proposed actions for different stakeholders, and potential funding sources to implement such actions.

Finally, it is worth noting that the benefits, actions and funding sources are not exhaustive but indicative of the work that leading stakeholders can do in order to contribute towards the European tourism ecosystem towards meeting the proposed targets.

Workshop Statistics

The workshop co-creation process included two workshop rounds. In total, 115 stakeholders participated in a first round of 12 agenda setting workshops, and over 90 stakeholders participated in the second round of three validation workshops. The distribution of the workshop participants is shown below for the overall consultation level (by gender, country of origin and type of stakeholder).

Overall Consultation Level
Participants Workshop Round 1
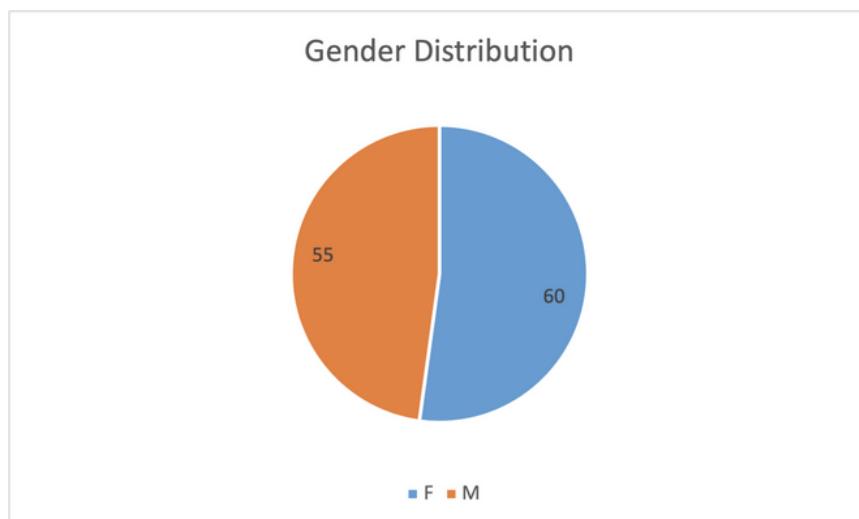
Figure 1: Summary of Gender Distribution
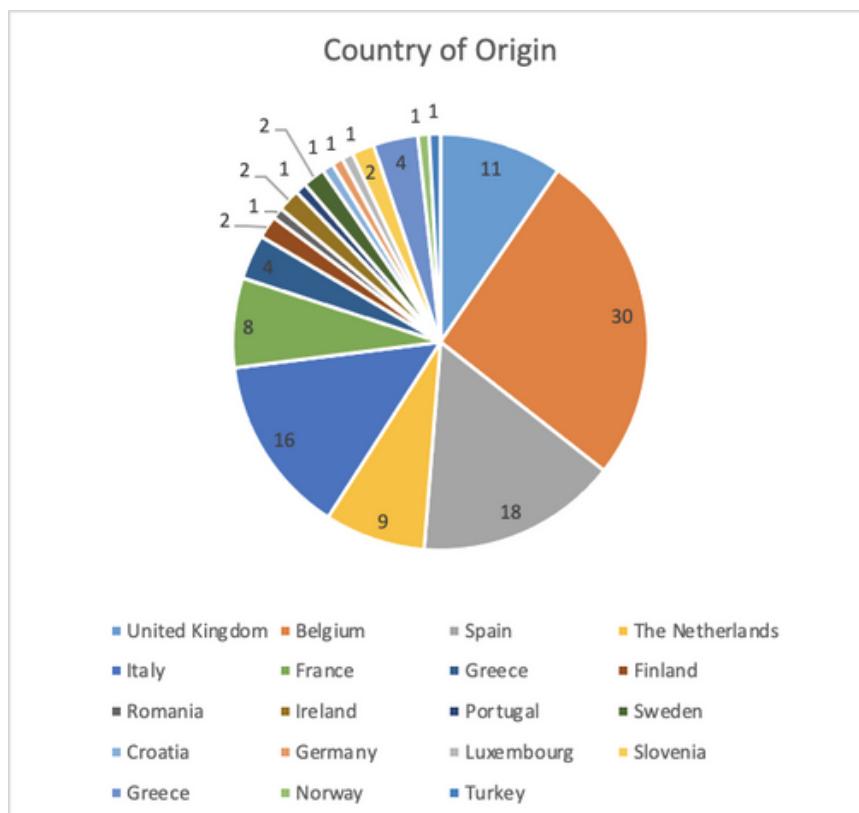
Figure 2: Summary of Participants' Country of Origin

Figure 3: Summary of Participants' Stakeholder Type

Overall Consultation Level
Participants Workshop Round 2
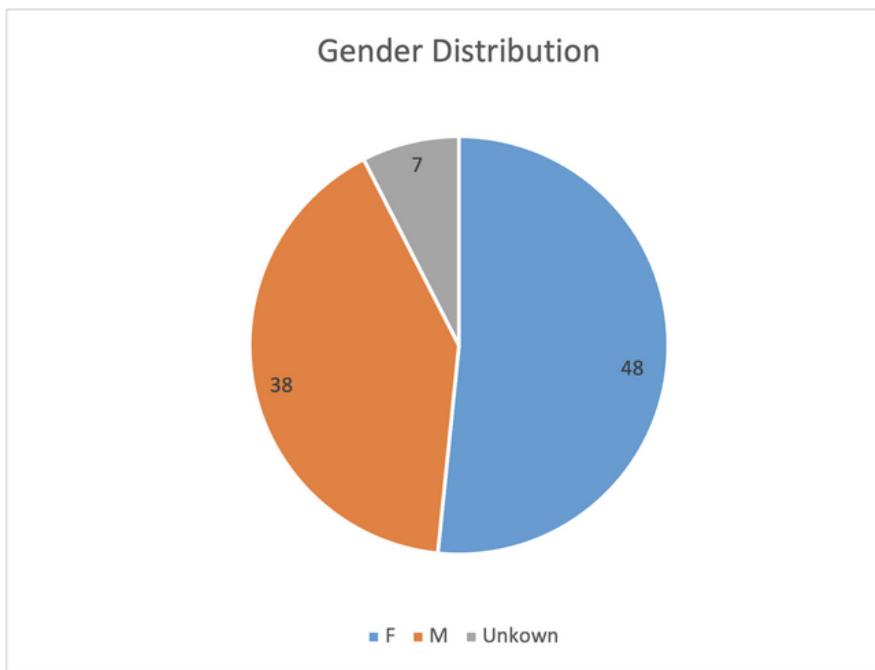

Figure 4: Summary of Gender Distribution
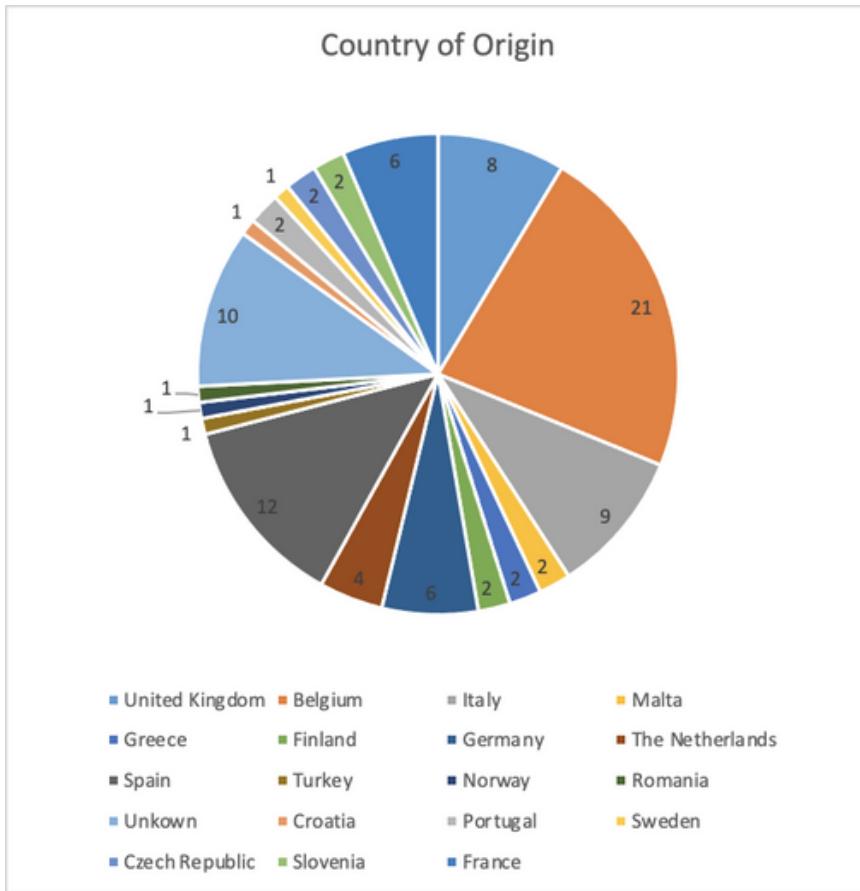
Figure 5: Summary of Participants' Country of Origin

Figure 6: Summary of Participants' Stakeholder Type

The distribution of the workshop participants is shown for each theme below, 1) Green Transition, 2) Digital Transition and 3) Resilient Transition, divided by workshop rounds (gender, country of origin and type of stakeholder).

1 Green Transition
Participants Workshop Round 1
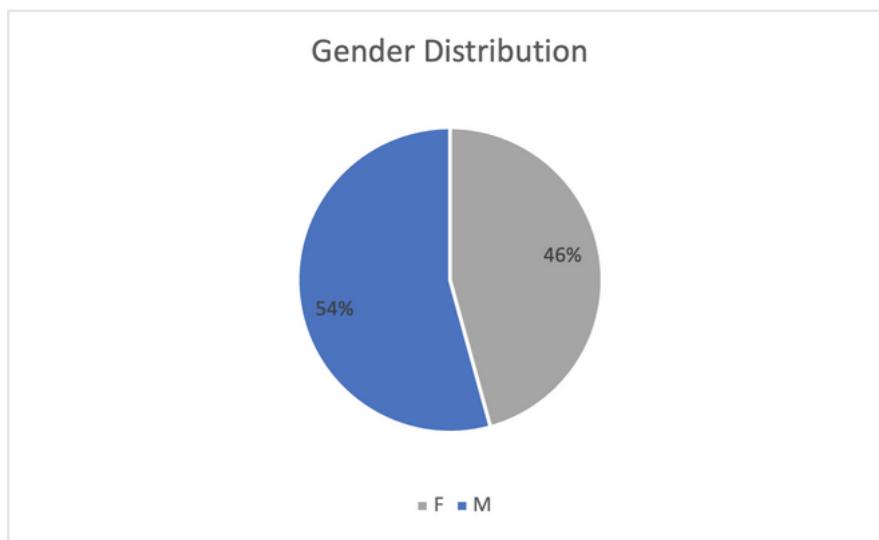
Figure 7: Summary of Gender Distribution
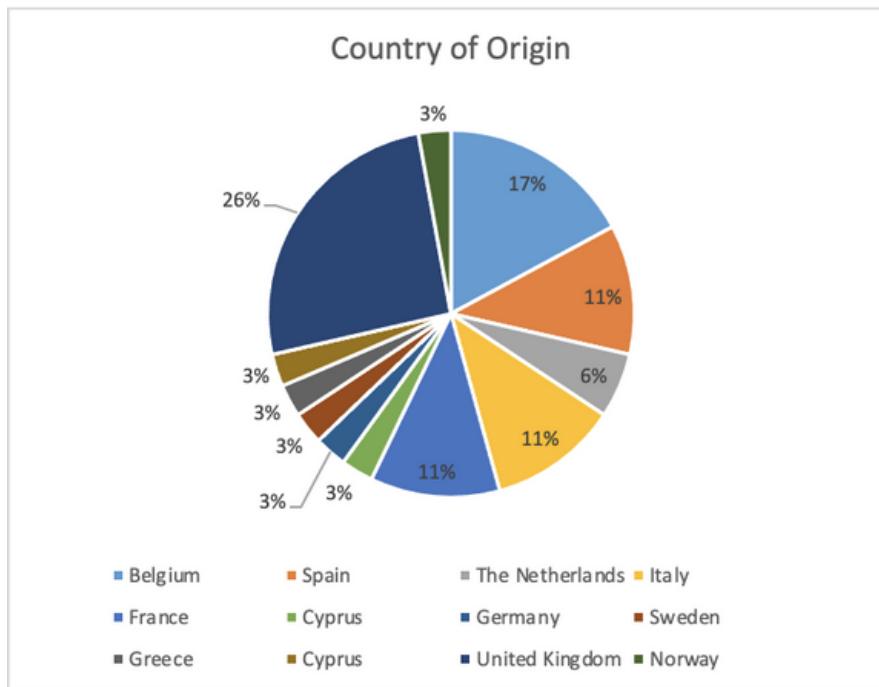
Figure 8: Summary of Participants' Country of Origin

Figure 9: Summary of Participants' Stakeholder Type

1 Green Transition
Participants Workshop Round 2
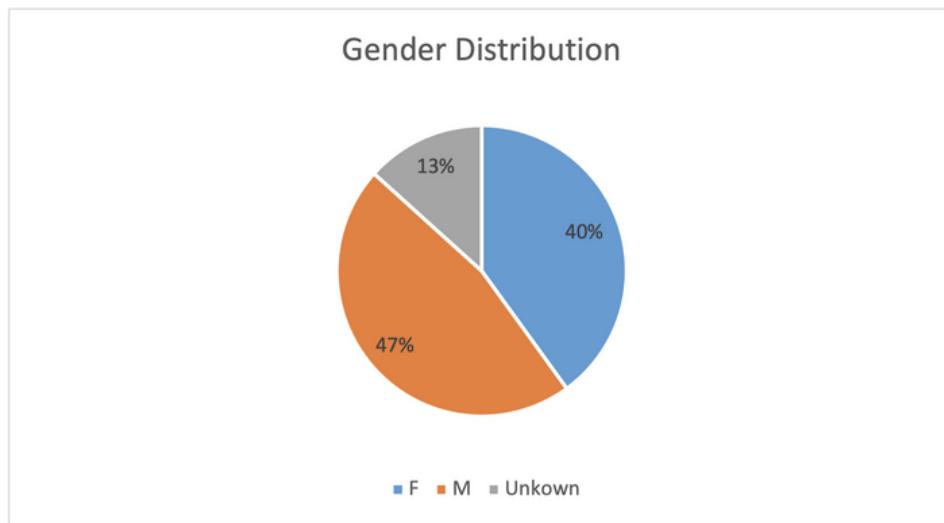
Figure 10: Summary of Gender Distribution
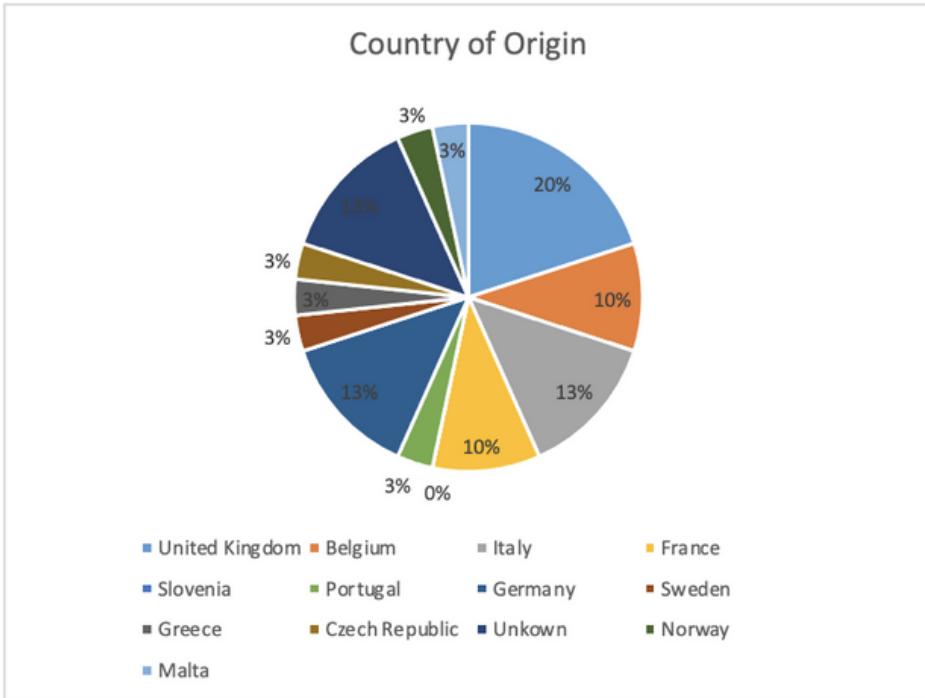
Figure 11: Summary of Participants' Country of Origin

Figure 12: Summary of Participants' Stakeholder Type

2 Digital Transition
Participants Workshop Round 1
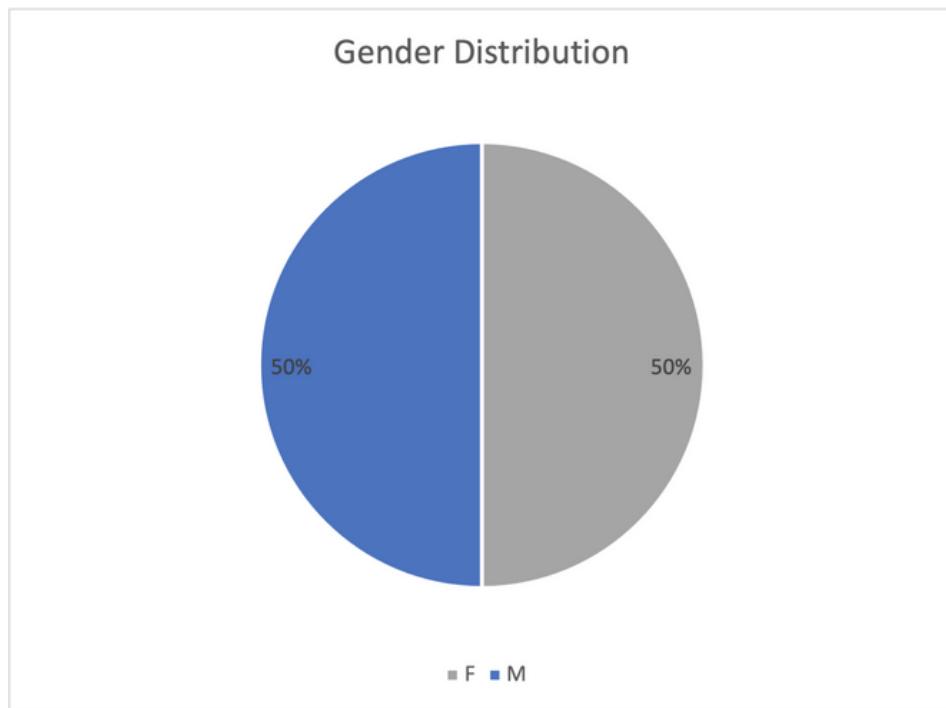
Figure 13: Summary of Gender Distribution
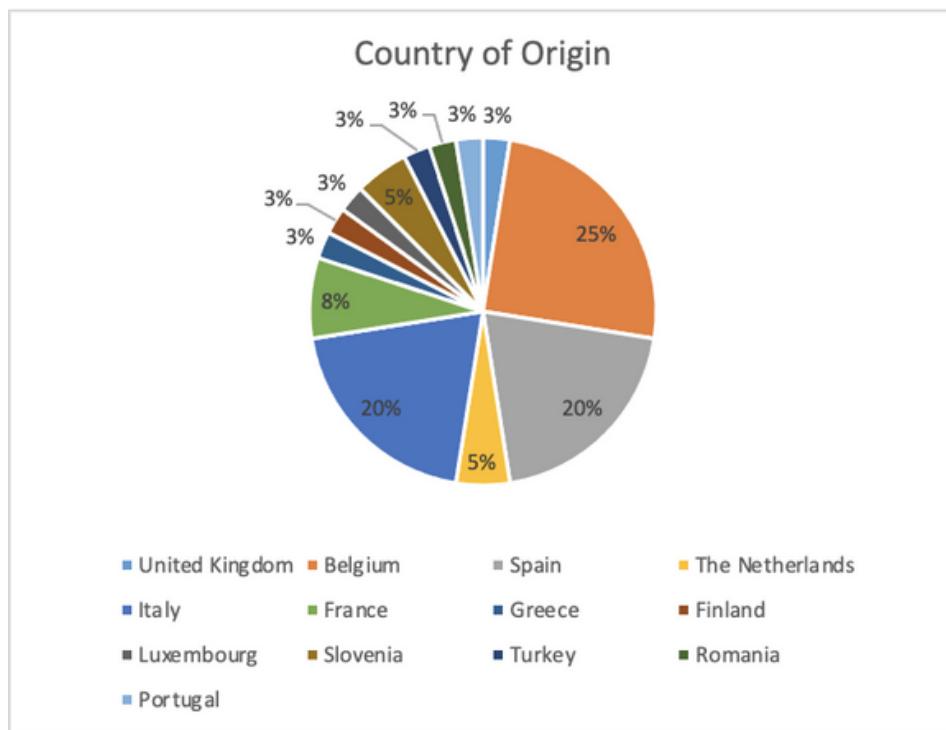
Figure 14: Summary of Participants' Country of Origin

Figure 15: Summary of Participants' Stakeholder Type

2 Digital Transition
Participants Workshop Round 2
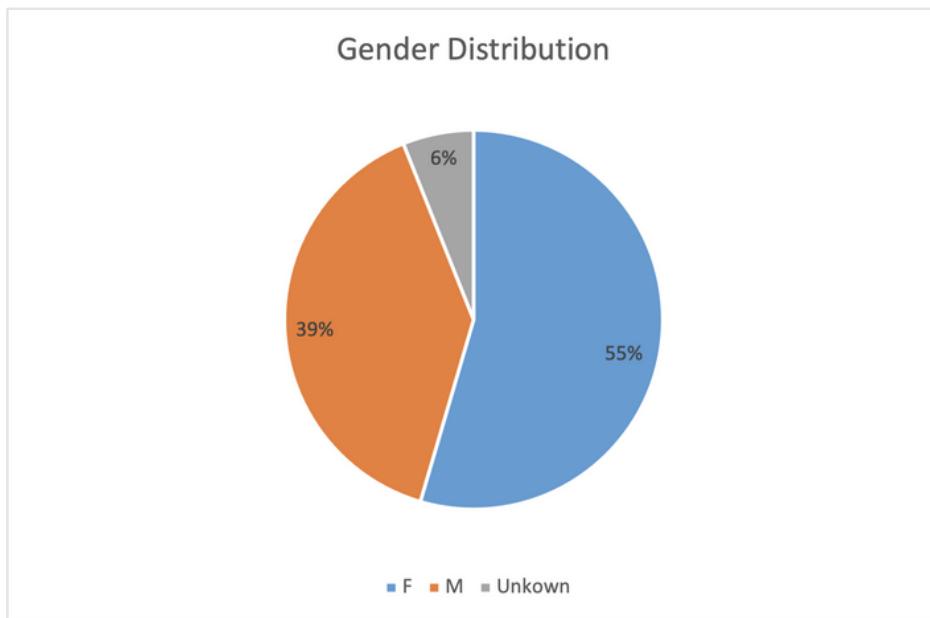
Figure 16: Summary of Gender Distribution
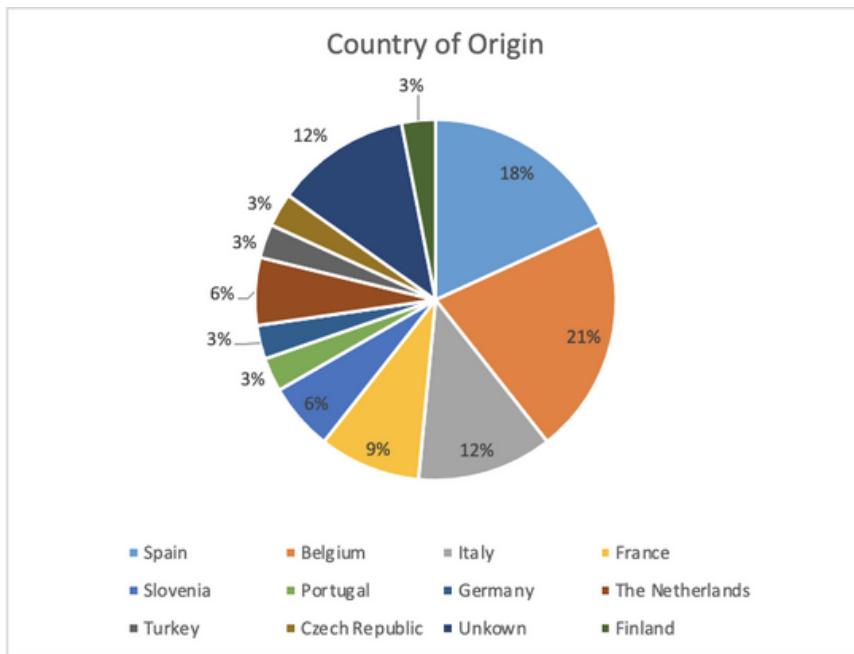
Figure 17: Summary of Participants' Country of Origin

Figure 18: Summary of Participants' Stakeholder Type

3 Resilient Transition
Participants Workshop Round 1
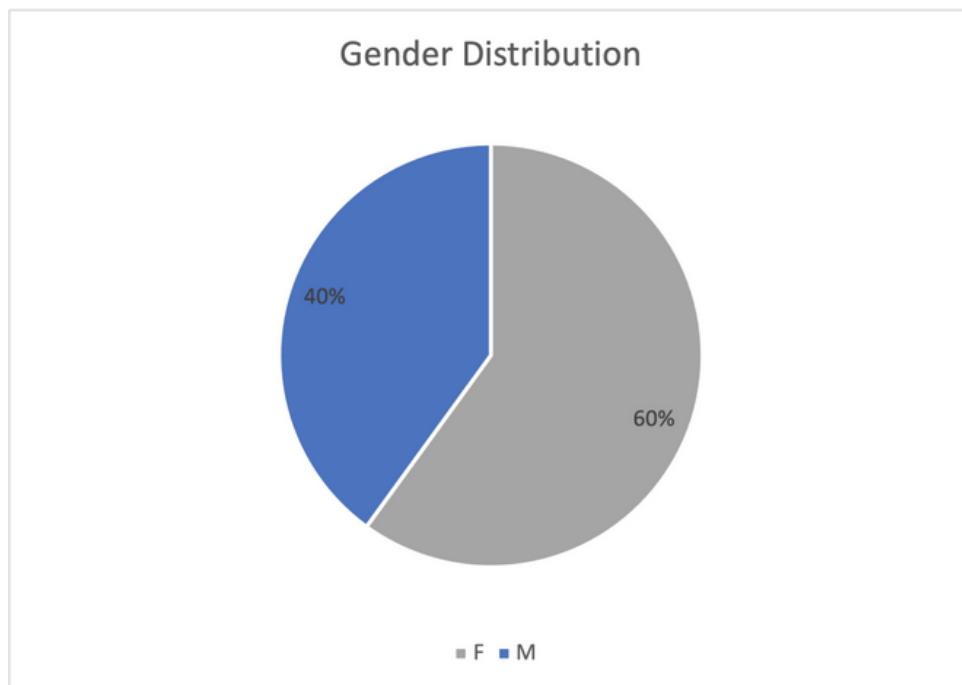

Figure 19: Summary of Gender Distribution
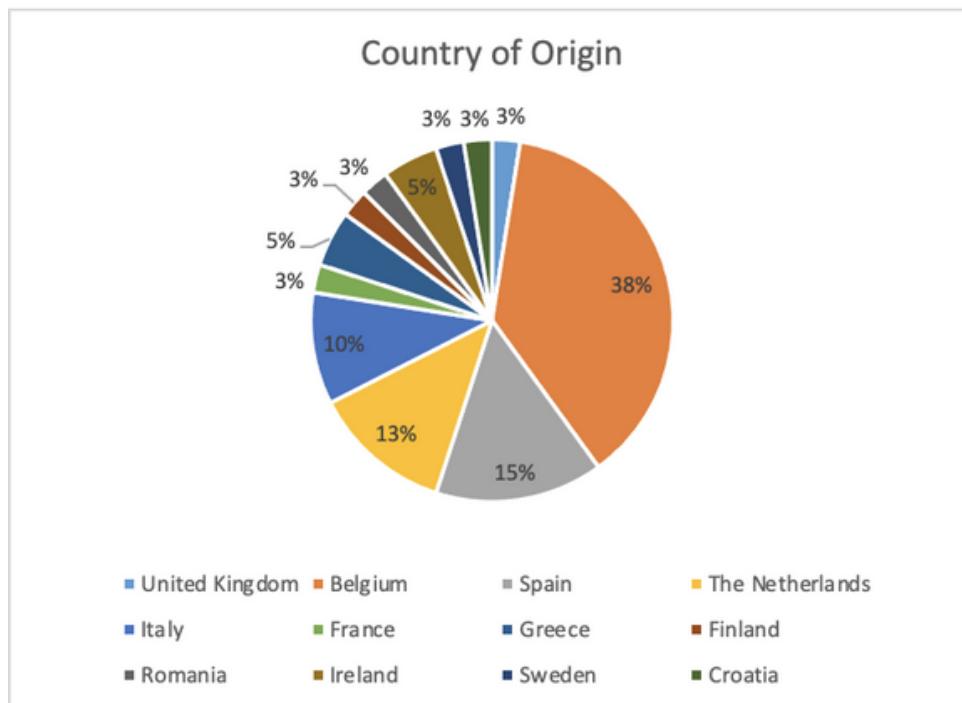
Figure 20: Summary of Participants' Country of Origin

Figure 21: Summary of Participants' Stakeholder Type

3 Resilient Transition Participants Workshop Round 2
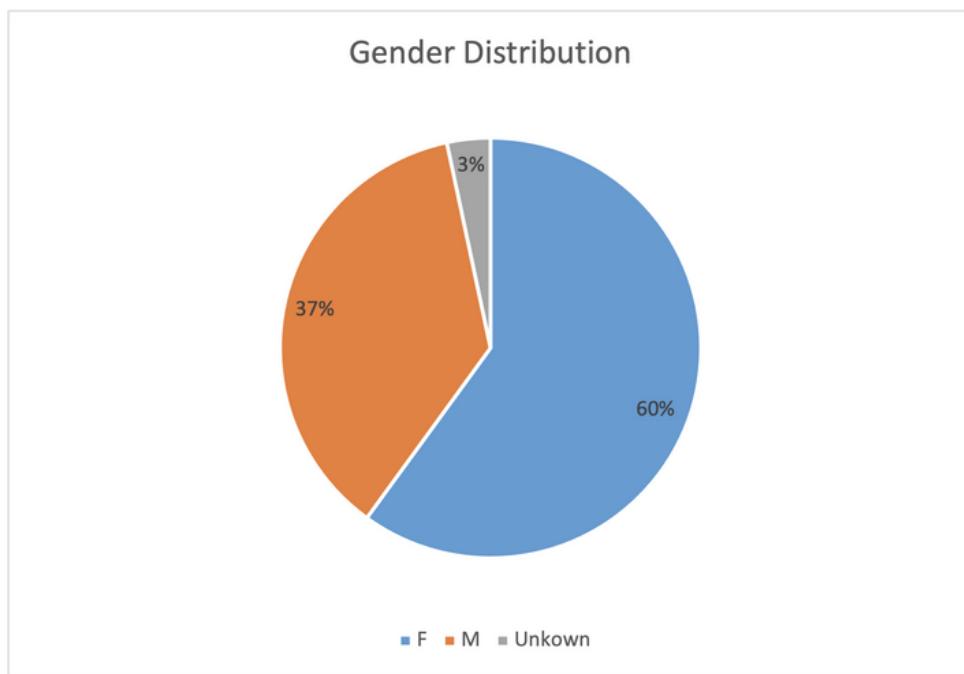

Figure 22: Summary of Gender Distribution
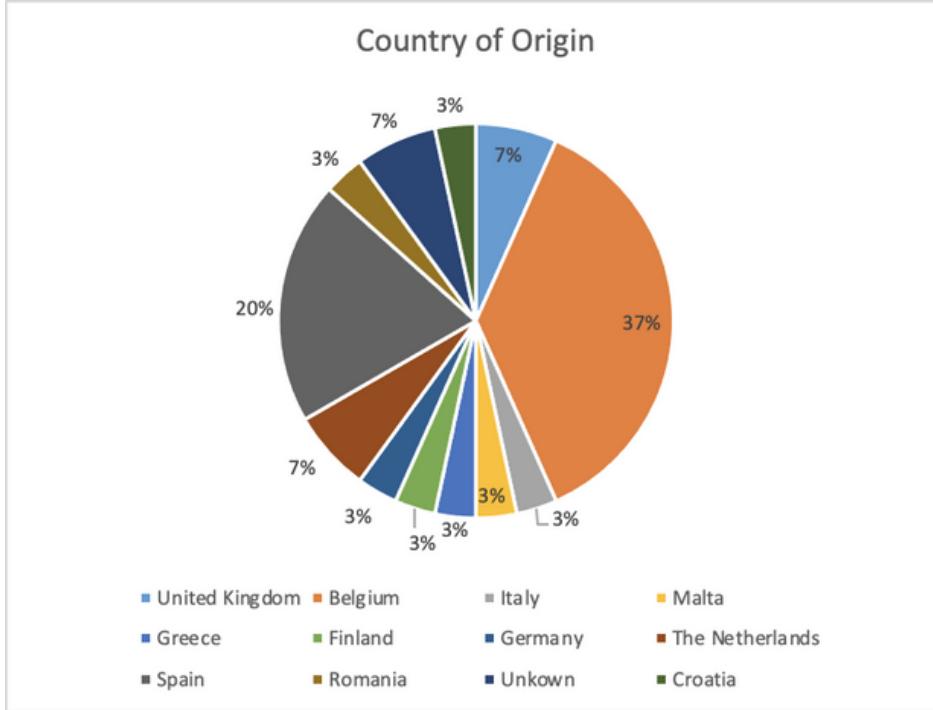
Figure 23: Summary of Participants' Country of Origin
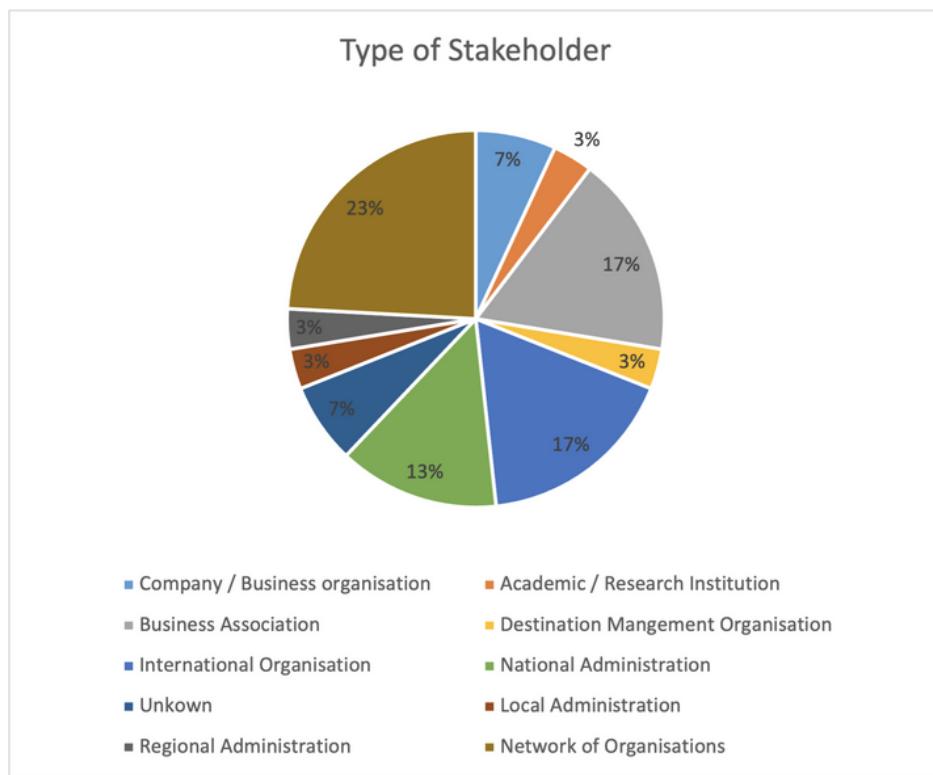
Figure 24: Summary of Participants' Stakeholder Type

Green Transition
Prof. Xavier Font and Dr. Gloria Crabolu

Ten transition pathway topics are outlined below, part of the Green transition pathway to make the European tourism ecosystem more sustainable and competitive. By 2030, governments shall produce and use data on sustainable tourism indicators to inform policy and implement National Sustainable Tourism Schemes; and organisations shall measure and report their environmental performance. Such transformation will facilitate the improvement of performance on five key areas: zero tourism transport emissions by 2050 will be feasible; the tourism industry will have renovated, energy efficient buildings; circularity for plastics in tourism will be common practice; tourism and hospitality organisations will reduce food waste; and tourism will contribute to biological protection and diversity. Identifiable improvements in practices will generate the opportunities to fulfil the demand for sustainable consumption: organisations will apply green procurement standards, and consumers will purchase green products. Section 1 outlines the recommended transition priority topics, targets and proposed actions per stakeholder group, for consultation purposes.

1 Governments produce and use sustainable tourism data and indicators to inform policy

2030 Target: In 2030, 75% of MS/regions' and 75% of destinations' strategies refer to sustainability data to inform their policies

Benefits: A coherent and complete picture of sustainable tourism and its trends provides a common language for discussing tourism issues, and functions as the basis for creating policy change at different system levels (European, National, Regional and Destination);

By 2025: A system with data information on the core sustainable tourism indicators is in place at all levels (European, National, Regional, Destination level); 30% of MS/regions' and 30% of destinations' strategies refer to sustainability data to inform their policies;

By 2022: A common framework exists which establishes what (and how) indicators shall be collected at different levels (European, National, Regional, Destination level); with maximum alignment with existing best practice in order to reduce duplication and fragmentation

Actions Required

European Commission (EC): Work with EUROSTAT and INSTO observatories to identify core sustainable tourism indicators and establish common framework – the framework to include reference points to distinguish between bad, average, good performance. Invest to expand the scope and granularity of the European tourism dashboard to include sustainable tourism indicators and tools to measure it, and to commission specific studies to measure tourism footprint and resilience in topics currently not surveyed. Dashboard to also include a map repository of best practice on how sustainability data is used to develop innovative policies – following the example of CPMR Regions Act; Emissions data will be part of the indicators used to take tourism policy decisions.

Member States (MS)/Regions: National and regional statistical institutions to consult with the EC in the development of the common framework, and to then implement the sustainable tourism indicators based on the framework; sustainable tourism data-informed policies facilitated by peer learning/benchmarking platform; To establish sustainable tourism observatories (e.g. INSTO) for R&D activities in monitoring sustainability; integrate data already existing into tourism policy decisions; emissions data will be part of the indicators used to take tourism policy decisions.

Destinations: To consult with the EC in the development of the common framework. To collect sustainable tourism indicators based on the common framework; Sustainable tourism data-informed policies facilitated by peer learning/benchmarking platform; Emissions data will be part of the indicators used to take tourism policy decisions.

Industry: To consult with the EC in the development of the common framework; businesses that focus on data tech and new technologies; utility and satellite data providers: start-ups/companies invest and innovate to provide innovative methods to collect data

Investments/funding: Horizon Europe; Digital Europe Funding, EU funding supporting Green Deal objectives, in particular Horizon Europe, NextGeneration EU, ERDF, national public and private funding

2 Governments adopt National Sustainable Tourism Schemes

2030 Target: 100% of National Tourism Organisations and regions to adopt Sustainable Tourism Schemes, with 25% of tourism destinations and 25% of service providers aligned with these schemes

Benefits for NTOs: Coordinated sustainable tourism development at national level where all destinations, and business providers follow the same approach; Constant monitoring, progress and improvement through identifying sustainability weakest and strongest points

Benefits for destinations and service providers: access to efficient tools that help address sustainable tourism development; common understanding of sustainability and deepened knowledge; benchmarking; repositioning on the market

By 2025: 60% of NTOs and regions have adopted Sustainable Tourism Schemes, with 10% of tourism destinations and 5% of service providers certified;

By 2022: 30% of NTOs and regions have published an action plan to adopt Sustainable Tourism Schemes

Actions Required

European Commission (EC): To launch a call to action to motivate NTOs to adopt and promote established Sustainable Tourism Schemes in accordance to the toolbox created by the European Travel Commission, the EC tools already existing and the Global Sustainable Tourism Council's (GSTC) standards; to endorse a Network of National Sustainable Tourism Schemes to foster learning both amongst NTOs and destinations within it; danger of fragmentation of systems when we need maximum alignment.

Member States (MS)/Regions: NTOs to adopt National Sustainable Tourism Schemes harmonised with the EC tools and GSTC; To establish or endorse existing minimum quality threshold criteria for certification schemes to be included in national scheme; to include sustainability as one of their specific area of work by allocating funding and human resources; to set up national tourism transition plans with goals and targets at national level.

Destinations: DMMOs to restructure their business model from marketing organisations to include destination management competences, and where this is not possible, to develop shared plans with agencies responsible for the planning and management of tourism; to develop sustainability strategies based on baseline assessments and implement sustainable tourism action plans to adhere to the established National Sustainable Tourism Scheme.

Industry: To consult with the EC in the development of the common framework; businesses that focus on data tech and new technologies; utility and satellite data providers: start-ups/companies invest and innovate to provide innovative methods to collect data.

Investments/funding: Horizon Europe; Digital Europe Funding, EU funding supporting Green Deal objectives, in particular Horizon Europe, NextGeneration EU, ERDF, national public and private funding.

3 Organisation measure and report their environmental performance

2030 Target: Organisation responsible for 80% of the market share will measure and report their environmental performance for impacts material within their sector (95% for tourism-related transport organisations by market share reporting emissions)

Benefits: Tourism suppliers will widely adopt sustainability practices in a way that can be identified, recognised and evaluated. Standards will continuously improve as a result of industry benchmarking. There will be clear guidelines on priority standards to meet, and cost-effective tools to achieve them.

By 2025: Organisations responsible for 50% of the market share will measure and report their environmental performance for key impacts within their sector (90% for tourism-related transport organisations by market share reporting emissions)

By 2022: Organisations responsible for 20% of the market share will measure and report their environmental performance for key impacts within their sector (75% for tourism-related transport organisations by market share reporting emissions)

Actions Required

European Commission (EC): Develop the tourism sectoral approach to the Product Environmental Footprint method, acknowledge other feasible methods of environmental measurement and reporting, considering the needs of small and medium sized firms.

Member States (MS)/Regions: Report environmental performance at regional/national level. Provide grants and loans for green investments. Apply Product Environmental Footprint method at national level. Set progressive requirements for environmental reporting. Measure and report environmental performance for any public sector owned tourism infrastructure, attractions and other organisations/ facilities.

Destinations: Report environmental performance at destination level; support industry associations to set materiality standards, and train industry to meet reporting standards. Measure and report environmental performance for any public sector owned tourism infrastructure, attractions and other organisations/ facilities.

Industry: Industry associations conduct materiality analyses, provide training and require reporting as membership requirement, and report on their members' performance. The majority of tourism businesses should understand and report at least on scope 1+2 carbon emissions, and for medium and large firms also scope 3 emissions, as well as other environmental impacts relevant to their sector.

Investments/funding: EU funding supporting Green Deal objectives, in particular Horizon Europe, NextGeneration EU, ERDF, national public and private funding.

4 Reaching net zero tourism transport emissions by 2050

2030 Target: The tourism-related transport industry will cut emissions by at least 55% compared to 1990 levels

Benefits: Providers will improve their business model to operate long term, while consumers will be able to continue travelling

By 2025: Sustainable energy/ fuel investment and production will be on track for the tourism and transport industry to meet the 55% target by 2030

By 2022: 100 public and private sector organisations across Europe will have developed plans to meet the Fit for 55 package requirements

Actions Required

European Commission (EC): Develop a clear and detailed model integrating tourism and transport and use this model to develop policy scenarios that form a general guidance for policymakers to achieve zero-emissions tourism transport. This model will also provide clear guidance in the roll out of the Fit for 55 package, including the functioning of market based mechanisms, availability of green electric energy and low carbon transport infrastructure, removal of tax exemptions for fuel, more mobility-efficient, i.e. fewer passenger-kilometres per guest-night, and substantial funding for both sustainable fuel development and infrastructure adaptation; aim to influence global policy to make CORSIA more effective to incentivise the development of alternative e-fuels and to reduce emissions, and review the market mechanisms to reduce emissions in flights to non-EU destinations. Work closely with energy providers to have the clean energy and carbon capture technology capacity; modernise airspace traffic management to lower the carbon footprint. Engage with cities and MSt to ensure that all large and medium-sized cities that are urban nodes on the TEN-T network put in place their own sustainable urban mobility plans by 2030.

Member States (MS)/Regions: Use taxation measures to incentivise the uptake of sustainable energy/fuel; invest in sustainable fuel and infrastructure to meet the ReFuelEU proposals; invest in seamless rail and public transport systems and electric charging and payment systems; work closely with energy providers to have the clean energy and carbon capture technology capacity. Develop integrated solutions to change visitors' behaviour from using single-occupancy cars to using public transport and shared mobility services.

Tourism to be integrated in the Sustainable Urban Mobility Plan (SUMP) developed by MS, Regions or Cities.

Destinations: DMOs to include emissions data in marketing strategies and industry partnerships with the aim of developing climate aware tourism product and promotion strategies; municipalities to invest in within-destination sustainable transport mobility, report and publish data on emissions at destination level; set goals for improving the mobility-efficiency (passenger-kilometres from home to destinations per guest-night). Promote long distance visitors access to ease pressure in tourism hotspots through collective transport modes; Apply strategies such as the 15-minute city and city for 8 to 8O (children and senior citizens) to tourism.

Industry: Invest in reducing emissions, supply storage and blending of sustainable aviation and marine fuel, monitor and publish data in a standardised format; set goals for improving the mobility-efficiency (passenger-kilometres from home to destinations per guest-night); energy providers need to have the clean energy and carbon capture technology capacity.

Investments/funding: EU funding supporting Green Deal objectives, in particular Horizon Europe, NextGeneration EU, ERDF, national public and private funding.

5 The tourism industry has renovated, energy efficient buildings

2030 Target: The tourism industry will reduce energy consumption and cut emissions from its built environment by at least 55% compared to 1990 levels

Benefits: 75% of the EU building stock is energy inefficient, and materials management accounts for up to two thirds of global greenhouse gas emissions, hence greater energy efficiency and circularity in buildings and construction in the tourism industry is a means to reduce energy consumption and waste, reduce consumption bills, improve material use and further reduce greenhouse gas emissions. This can improve the attractiveness of the tourism offer to markets.

By 2025: The tourism industry will reduce energy consumption and cut emissions from its built environment by at least 25% compared to 1990 levels

By 2022: Member states will be implementing national strategies for tacking energy efficiency and circularity in buildings through the integrated national energy and climate plans.

Actions Required

European Commission (EC): Survey energy efficiency and greenhouse emissions for the tourism industry, and tourism-specific content in the European Portal for Energy Efficiency in Buildings; provide financial incentives to develop technologies and set standards to increase energy efficiency and circularity in the building sector, adapt these tools to the specificities of the tourism industry.

Member States (MS)/Regions: Implement national strategies for tacking energy efficiency and circularity in buildings through the integrated national energy and climate plans, adapt them to the tourism industry and promote them amongst industry associations. Inform and equip stakeholders from the building sector working in tourism projects with the skills and knowledge needed to ensure building and renovation projects meet energy efficiency and circularity requirements.

Industry: Invest in long-term renovation, aiming for nearly zero-energy buildings, supported by energy audits and performance certificates, and global certification schemes on sustainable buildings like LEED, BREEAM, DGNB and others. Apply circular economy actions to the product design, production process, consumption model and demolition & waste management of tourism infrastructure and buildings, focusing on the most energy intensive materials and processes with greatest potential: the reduction of overspecification of concrete in building plans, the use of innovative and alternative cements, and the reuse of structural steal.

Investments/funding: EU funding supporting renovation wave Green Deal objectives, in particular Horizon Europe, 'Green Infrastructure Strategy' linked to Nature 2000; SME window of InvestEU; NextGeneration EU, ERDF, National Recovery and Resilience Plans, national public and private funding.

6 Circularity for plastics in tourism is common practice

2030 Target: In 2030 75% of tourism organisations have eliminated problematic and unnecessary plastics; 75% of plastic bought is from recycled materials; and have moved from single-use towards reusable, recyclable or compostable

Benefits: The shift towards plastic circularity is crucial towards achieving a low carbon economy that ensures biodiversity protection of our oceans and land. It contributes towards job creation and investment in the tourism industry and beyond. It contributes towards providing a tourist positive experience who increasingly seek for environmentally friendly products.

By 2025: 50% of tourism organisations have eliminated problematic and unnecessary plastics and have moved from single-use towards reusable, recyclable or compostable, 50% of plastic bought is from recycled materials

By 2022: EU action plan for circularity of plastic in tourism is created, in line with the EU Circular Economy Action Plan, European Strategy for Plastics and Global Tourism Plastics Initiative

Actions Required

European Commission (EC): Partner with the UNWTO Global Tourism Plastics Initiative and EU Circular Plastic Alliance to create a common approach for commitments and pledges around circularity for plastics in tourism; invest towards a common approach in measuring circularity for plastic in tourism – in line with the common indicators which will be established for the EU Circular Economy Action Plan (tourism data out to be extracted); make reference to UN SDGs to coordinate European and global efforts; pay particular attention to the needs of peripheral EU regions.

Member States (MS)/Regions: Regulate and provide tailored support to ensure that circularity of plastic is integrated in the tourism industry (e.g. use of taxation and other economic instruments to reward the uptake of recycled plastics and favour reuse and recycling over landfilling and incineration); engage in cooperation projects to develop a global response to the increase in marine litter; ban single-use plastic cutlery, plastic plates, plastic straws, cotton bud sticks made of plastic and plastic balloon sticks as well as oxodegradable plastics, food containers and expanded polystyrene cups; develop communication campaigns for tourists and residents.

Destinations: Support partnerships between tourism stakeholders; create campaigns to educate on the problems from plastics and offer training to businesses on how to embed plastic circularity in their operations; promote nature cleanup activities; step up waste collection, and improve coordination between the authorities responsible for waste management, water and the land and sea environments; communication campaigns for tourists and residents.

Industry: Monitor the plastic waste reduction in their operations; take concrete steps to eliminate single use plastic and integrate circularity of plastics in operations; dialogue with supply chain to create demand for alternatives to single-use plastic items; participate in innovation programmes and hackathons on eco-design items for the tourism/hospitality industry; respond to consumer demand for alternatives to plastics.

Investments/funding: EU funding supporting Green Deal objectives, in particular Horizon Europe, NextGeneration EU, European Fund for Strategic Investments, Structural Funds, ERDF, national public and private funding; Technical Support: Circular Economy Finance Support Platform.

7 Tourism/hospitality organisations reduce food waste

2030 Target: Tourism/hospitality organisations reduce food waste by 50% to meet SDG 12.3.

Benefits: It provides a clear contribution in favour of a more sustainable food chain and society; it supports local communities by connecting people/tourists with local food production; it reduces hospitality operational costs with short-term economic benefits; it promotes local financial circularity, less reliance on longer supply-chains and therefore, and more resilience to crises impacting access to resources.

By 2025: Tourism/hospitality organisations will reduce food waste by 30%; a unified measurement tool for measuring food waste at tourism/hospitality business level is widely adopted.

By 2022: Baseline data on food waste in the tourism/hospitality sector is available for all MS/Regions; a unified measurement tool and guidelines for reducing food waste - based on the circular economy principles - are developed

Actions Required

European Commission (EC): Measure data on food waste in EUROSTAT; review health and safety standards to incorporate food circularity principles; create repository of projects relating to food waste reduction in tourism with guidelines, measurement tools and best practices (e.g. capitalise on the already existing
https://circulareconomy.europa.eu/platform/ or
https://ec.europa.eu/food/safety/food-waste_en).

Member States (MS)/Regions: Conduct a baseline measurement of hospitality food waste, following the principles of food waste hierarchy. Make food waste separation compulsory in the hospitality sector; measure hospitality food waste; develop awareness and training programme initiatives and campaigns to reduce food waste in the tourism sector based on the circular economy principles; increase awareness on the role of new technologies to help tackle food waste; provide incentives for the application of food hierarchy and to enable the use of digital technologies; and provide grants for research and development of innovative practices; train food producers and distributors to produce food with a lower environmental footprint and reduce waste at source.

Destinations: Provide training following the principles of food waste hierarchy and support businesses to practically apply these strategies and be aware of their economic benefits, create local chef initiatives to develop plant-based menus, use seasonal and local ingredients and tackle food waste; support helps tourism businesses find solutions to re-circulate the unavoidable food surpluses, food waste and by-products; support the provision of infrastructure to create destination-based food circularity; pilot test and use new technology aimed at food waste monitoring and reduction; collaborate with nearby destinations when needed.

Industry: ·Develop and implement food circularity strategies following the principles of food waste hierarchy; redesign menus to include more seasonal, locally sourced and plant-based options; prioritise suppliers that apply circular food principles; pilot test and use new technology aimed at food waste monitoring, reduction, sharing and repurposing; enrol in national schemes that have a direct or indirect positive effect on food waste reduction; set earlier baseline dates when food waste programmes started earlier. Circularity training is incorporated into standard training for all F&B teams.

Investments/funding: EU funding supporting Green Deal objectives, in particular Farm to Fork Programme; Horizon Europe, NextGeneration EU, European Fund for Strategic Investments, Structural Funds, ERDF, national public and private funding; Technical support from EIT Food Accelerator Network; RisingFoodStars network, Seedbed.

8 Tourism benefits are part of plans to increase biological protection, diversity and conservation

2030 Target: Sustainable tourism is part of the argument in 90% of proposals to enlarge the EU-network of protected areas on land and sea, to increase the level of management of these areas, and to develop and fund conservation plans.

Benefits: Protected lands and biodiversity are key resources to promote sustainable tourism, and to provide human wellbeing through contact with nature, and tourism is one of the few sources of revenue makes a non-consumptive use of natural resources. Tourism contributes to policy arguments to protect land and sea.

By 2025: Each MS will have a joint plan between the Ministry of Environment and the Tourism competent authority to sustainable nature-based tourism to generate in order to increase the size of its protected areas

By 2022: There will be a European plan and roadmap for tourism's contribution to the EU biodiversity strategy for 2030

Actions Required

European Commission (EC): Promote tourism a key source of livelihoods for non-consumptive use of nature in the EU Biodiversity Strategy and the Global Biodiversity Framework and the 30x30 conservation target.

Member States (MS)/Regions: Develop transition plans to protect and regenerate and restore land and sea, particularly with high biodiversity value, incorporating revenues from sustainable tourism as part of the transition plans; provide capacity-building and development, technical and scientific cooperation and technology transfer to implement the Global Biodiversity Framework to 2030 and the 30x30 conservation target; regulate so that harvesting, trade and use of wild species is sustainable, legal and safe for human health; Raise funds from tourism to support biological protection; incorporate biodiversity criteria in tourism destination planning.

monitor tourism performance and impact in conservation areas. Capitalise on Smart Specialisation Strategies (S3) in favour of innovative sustainable tourism offers/solutions/services that support biological protection.

Destinations: Design tourism experiences to enhance biodiversity protection, diversity and conservation; provide training for sustainable nature-based tourism providers to develop their businesses, promote sustainable tourism as a source of income generation in protected areas. Raise funds from tourism to support biological protection; incorporate biodiversity criteria in tourism destination planning; monitor tourism performance and impact in conservation areas.

Industry: Generate tourism revenue for local communities formerly relying on extractive economies; set aside a percentage of land for nature; fund regenerative and restorative programmes; manage land for conservation and education purposes; ensure that harvesting, trade and use of wild species is sustainable, legal and safe for human health; use their own land to encourage biodiversity; encourage biodiversity in their supply chain.

Investments/funding: Member States, funds aligned with the EU Biodiversity Strategy, national funds aligned with environmental protection, private landowners, philanthropic sources.

9 Organisations apply green procurement standards

2030 Target: Green procurement is common practice amongst buyers/distribution channels responsible for 75% of the tourism industry by market share: buyers/distribution channels will either request green performance data of their suppliers, or ask them to meet green performance criteria. 75% of tourism (95% of transport) businesses by market share will provide their green performance data to their buyers/distribution channels. Threshold sustainability criteria will be regularly increased for minimum performance.

Benefits: Clearly understood environmental standards and a market incentive to be green will allow public and private sector green purchasing policies to be scaled up, providing a clear market incentive to further improve green performance. Consumers will enjoy greener products without having to change their behaviour.

By 2025: Green procurement is common practice amongst buyers/distribution channels responsible for 50% of the tourism industry by market share: buyers/distribution channels will either request green performance data of their suppliers, or ask them to meet green performance criteria. 50% of tourism (90% of transport) businesses by market share will provide their green performance data to their buyers/distribution channels. Threshold sustainability criteria will be set for minimum performance.

By 2022: Buyers and distribution channels responsible for 50% of the market share will request their suppliers to provide environmental performance data.

Actions Required

European Commission (EC): Develop green public procurement criteria for the products that are of importance in tourism, hospitality, transport and events, based on EU tools and GSTC Criteria. Apply these criteria for EC procurement decisions.

Member States (MS)/Regions: Apply European green public procurement criteria for catering, and others as they are developed. Provide technical support and grants/loans to small and micro firms to meet standards so green procurement does not become a barrier to trade. Develop registry of green suppliers.

Destinations: Apply European green public procurement criteria for catering, and others as they are developed. Train suppliers on how to meet green purchasing requests; support industry associations to introduce green procurement standards for their members; develop registry of green suppliers.

Industry: Apply transparent and equitable green standards to facilitate the selection of suppliers; industry associations to set green procurement standards as membership requirement, and to monitor and report on percentage of members practicing green procurement. Threshold sustainability criteria will be set for minimum performance.

Investments/funding: EU funding supporting Green Deal objectives, in particular Horizon Europe, NextGeneration EU and ERDF; national public and private funding.

10 Consumers purchase green products

2030 Target: 50% of the tourism products and services that consumers of EU products will buy are greener, and 90% of consumers of EU tourism products will expect EU suppliers as well as EU consumers purchasing tourism products outside Europe to provide green choices.

Benefits: Increased demand for green products will provide incentives for tourism businesses to accelerate their transition towards greener practices. Consumers will enjoy greater quality of products and services as a result.

By 2025: 25% of the tourism of EU products and services that consumers will buy are greener, and 75% of consumers of EU tourism products will expect EU suppliers as well as EU consumers purchasing tourism products outside Europe to provide green choices.

By 2022: 10% of the tourism of EU products and services that consumers will buy are greener, and 50% of consumers of EU tourism products will expect EU suppliers as well as EU consumers purchasing tourism products outside Europe to provide green choices.

Actions Required

European Commission (EC): Foster the uptake, visibility and awareness of recognised sustainable tourism products; integrate sustainability data and transport and mobility data into Eurostat tourism consumer surveys. Collaborate with MS and industry to jointly gather data.

Member States (MS)/Regions: Collect data on current sustainability of consumer behaviour based on Eurostat methodology; Increase consumer awareness about sustainable tourism products; Set targets for consumer behaviour strategy based on the calculation of what behaviour change is required to achieve a 1.5C target; collaborate with MS and industry to jointly gather data.

Destinations: Provide marketing advantages and other benefits to sustainable products; Increase consumer awareness about sustainable tourism products; train businesses how to communicate how sustainability creates a better customer experience and is better for the planet.

Industry: Share pre-competitive open-source data on what works for consumer behaviour change, and which green practices increase consumer satisfaction, intra-industry marketing effort to communicate sustainable tourism products; ensure that more products have sustainability features by default.

Investments/funding: EU funding supporting Green Deal objectives in particular Horizon Europe, NextGeneration EU and ERDF; national public and private funding.

Digital Transition
Prof. Barbara Neuhofer

Eight transition pathway topics are outlined below as part of the Digital transition pathway to make the European tourism ecosystem more digitally empowered. By 2030, tourism is data-powered with a European framework for tourism data standards and a tourism data space in place. A digital European tourism market information space exists in which tourism offers can be found across borders for an integrated tourism experience. The development of smart tourism destinations is on-going and Europe can be experienced as one integrated smart tourism destination. Destinations offer virtual twin experiences that can be visited before, during and after travel. Innovative sharing economy platforms and business models have emerged, meeting post-COVID new consumer demands and contributing to fair practices and value co-creation for all tourism destination stakeholders. A clear regulatory framework for European tourism sharing economy platforms, e.g. especially accommodation exists. Tourism stakeholders are digitally empowered and competent to participate in the digital value chain. Digital destination innovation hubs and satellites are established on national and regional levels as platforms offering digital infrastructure and advanced digital competences to support tourism SMEs. Tourism SMEs and the tourism workforce is trained and digitally proficient on both, basic and advanced specialist skill levels. In the following section, recommended transition priority topics, targets and proposed actions per stakeholder group are outlined.

1   A European framework for Tourism data standards

2030 Target: There is a European framework of data in terms of a 100% unified and used standard and data language that is used by all stakeholders.

Benefits: Improves collection, analysis and use of data by based on a shared ontology that is understood and used by all stakeholders; unifies data efforts across all member states; improves the ease of use and fosters the adoption of real-time data-empowered tourism.

By 2025: Language standards are finalised. MS, regions, destinations have taken on the Minimal Interoperability Mechanisms (MIMS Plus) for public data sharing as defined in the proposal for a European Interoperability Framework for Smart Cities and Communities (EIF4SCC). Destinations and industry agreed on a common language and a common set of definitions at EU level to discuss data sharing in tourism.

By 2022: There is a European wide cooperation on-going to work on data harmonisation and defining common language (e.g. indicators, lowest possible common denominators, need for specificity/authenticity). Regions and destinations uphold a data strategy, taking into account the guidance by the Code of Conduct for Data Sharing in Tourism (in preparation), as well as by the Living-in.eu work in defining open standards and common technical specifications such as MIMSPlus.

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Actions Required

European Commission (EC): Lead the development of a European shared data language framework with a standardised methodology for tourism data; Establish a guiding body for strategic data management. Develop a data interoperability framework for guidance to support for industry.

Member States (MS)/Regions: Participate in the development of data ontologies and coordinate efforts on national and regional levels with consultation within NTOs and DMOs. Take on MIMS. Apply only-once principle application for public authorities for data collection.

Destinations: Ensure a minimum defined level of data quality; participate in the language development consultation and agree on definitions; support small/micro tourism infrastructures in data sharing and standardisation. Apply only-once principle application for data collection. Develop infrastructure and capacity to use real-time data in peripheral destinations.

Industry: Create open data initiatives on a regular basis, or at least twice a year, e.g. data hackathons; disseminate on their website the importance of data in tourism for awareness raising purposes; Apply only-once principle application to collect data from businesses / tourists.

Investments/funding: Horizon Europe, Digital Europe

2   A European shared tourism data space network

2030 Target: In 2030, there is access to a shared European tourism data space network by all stakeholders, which is used by businesses responsible for 50% of the market share. Incentives for data collection, sharing and measuring are in place and followed by stakeholders.

Benefits: Ease of access and effective use of data, interconnectedness of data for effective management of tourism activity (e.g. enhanced real-time tourism flows, tourist experiences), enhanced data privacy, security, transparency for consumers.

By 2025: Interconnections of existing data bases are finalised. Have a shared data space with rules and common practice on how to access and use data, used by 25% of tourism stakeholders. Have a supportive combination of soft policy tools (e.g. code of conduct on data sharing in tourism data space) and hard policy tools (e.g. legal frameworks, e.g. DGPR, DAC7 Directive, the Digital Services Act, Data Act, Data Governance Act) in place.

By 2022: There is an agenda on data development involving all stakeholder groups that defines a procedure on what tourism stakeholder needs are, what type of data is needed in this space (e.g. number and profile of visitors, impact on tourism), who the data providers are, how data are collected, and how guaranteed access and flow of tourism data for SMEs is given. Different data sources are integrated, including tourism sectoral and non-sectoral data. Best-practice use cases for data spaces are identified from tourism and non-tourism sectors.

Actions Required

European Commission (EC): Define standards to guarantee interoperability of systems. Define common rules and policies across SMs; create EU shared data space on a steady basis; Develop awareness and educate consumers for an understanding and awareness of how data are used. Existing regulations and frameworks (e.g. transport data, Data Act) are used as basis for the definition of the tourism data space network avoiding additional burdening on stakeholders to create soft/hard policies. Avoid data monopolies (regulation); Launch awareness raising campaign on value of data use for SMEs. Develop a legislation to guarantee data flow of SMEs for access and sharing of data by 2022. Develop a framework of data sharing practices, taking into account reasonable remuneration, liability, competition, privacy and data security for customers (e.g. by considering existing frameworks GDPR).

Member States (MS)/Regions: Avoid data monopolies (regulation); Develop new ways on how governmental institutions are collecting, analysing and publishing data; initiative for companies to share information and data open access, NTOs to contribute and use data flow withing European data space network; build at least one data infrastructure at national level connecting data holders and data hubs (2030) and develop satellites on regional levels; activate all connections between destination managers and the Digital Innovation Hubs on the territory, disseminating information on the role of the Hubs, and reporting at EU level on the support provided to destination managers (2025); report at EU level on regulatory barriers to data sharing at national and regional level (2022). Awareness raising campaign on the value of data use for SMEs. Eliminate grey zones of different data uses and legislations across MS by following the framework of the European data space. Interconnect national databases. Develop data sharing systems and create/amend the local regulations in a way that promotes data sharing.

Destinations: Develop stakeholder awareness of the importance of data, specifically one-time data and real-time data collection; collaborate with national / regional data hubs and provide support for SMEs; avoid delay in data analysing and publishing, develop data analytics competences in order to be part of tourism data network; develop and uphold a data strategy, taking into account the guidance by the Code of Conduct for Data Sharing in Tourism (in preparation), as well as by the Living-in.eu work in defining open standards and common technical specifications such as MIMSPlus. Industry associations to take joint responsibility to promote awareness on value of data use for SMEs.

Industry: Contribute to the consultation process on the data space by defining data needs. Develop and follow a code of conduct for data sharing practices to encompass all economic operators in the tourism sector, incl. digital players, such as search engines and mapping platforms, social media networks, travel intermediaries, transport, accommodation and service providers; data protection; clear communication for tourists to understand the conditions and their personal benefits when disclosing data (e.g. experience personalization in real-time); develop and present a set of incentives needed to include progressively wider sets of data to the public sector in order to clarify expectations and the value of data for large companies and SMEs. Adhere to unified standards on what type of data has to be shared (e.g. type of data, timeliness up-to-date, real time data).

Investments/funding: Horizon Europe, Digital Europe

3   A digital European tourism market information space

2030 Target: In 2030, there is a unified European online market information space, covering 75% of tourism offers across European borders, made available based on a common standard. Offers can be searched based on personal interests, e.g. to visit Van Gogh paintings, learn Italian traditional cooking. This is a non-commercial solution.

Benefits: Improves access to tourism offers for tour operators (B2B), improves accessibility and personalisation for consumers (B2C) and visibility of different types of tourism services based on a shared ontology for an integrated tourism experience across Europe.

By 2025: European digital directory of digital and physical tourism offers populated with content from all MS and minimum 50% of all NUTS2 regions. Have a balanced tourism offer that promotes and preserves regional and local authenticity tourism offers;

By 2022: Have a pilot for defining the basic criteria for a shared ontology of tourism offers aggregating in this information repository, e.g. hotels, transport, museums, restaurants, micro tourism / niche / ancillary services and experiences). Have identified the technical requirements for implementation non-competing with existing platforms, interlink with real-time data and make it inclusive and accessible.

Actions Required

European Commission (EC): Coordinate developing a shared repository and leading the development of a shared ontology; offer financial support for a pilot implementation of the market information space.

Member States (MS)/Regions: Strategic approach and funding for SMEs for developing digital (information of) tourism offers; disseminate information on the role of the market information space. Financial support for a pilot implementation in each MS.

Destinations: Create awareness and support local tourism actors with knowledge about offering services in the digital market information space; support and coordinate tourism offer aggregation efforts on destination and local SMEs level.

> **Industry:** Openness to new forms of tourism, effort investment in making tourism services and experiences digitally searchable; create clear communication for tourists to understand the benefits of using the platform.

Investments/funding: Digital Europe, EU Regional funding

4 Digitalised and virtual tourism experiences

2030 Target: In 2030, 75%] of DMOs have a digitalised and virtual twin offer of physical tourism experiences that can be visited by tourists, complementary before and after travel and as a stand-alone virtual experience. Have a digital experience offer by 25% of Natura 2000 network tourism providers of cultural / natural heritage sites at risk.

Benefits: Extends the on-site tourism experiences to never-ending tourism activity and prolongs tourism customer engagement before and after travel; improves accessibility (people with disabilities and special needs, ageing population); decreases capacity pressures, over-crowding and over-tourism; increases preservation of sites and risk, enables digital reconstruction of historical sites; digitalisation supports sustainable green tourism consumption.

By 2025: Have a digital experience by 10% of Natura 2000 network tourism providers of cultural / natural heritage sites at risk (e.g. 3D modelling and/or 360° visits and online availability); have a shared awareness of never-ending tourism supported by digital and virtual offers; 50% of NTOs (and large DMOs) have as a common practice digital tourist offices that tourists can visit as experiential virtual spaces.

By 2022: Have an awareness about the importance of virtual twin offers and digital tourist offices on a NTO and DMO level; Have a pilot for digital offers established for rural, insular and peripheral areas in collaboration with SMEs / micro enterprises. Develop pilots for the digitalisation of European cultural heritage. Have a dialogue with niche and specific tourism experience providers (e.g. Religious Ways; Sports Tourism) for the development of digital content and storytelling. Digital touchpoints (e.g. web accessibility) must be guaranteed in accordance with the European Disability Act reference standard wcag 2.1.

Actions Required

European Commission (EC): Support the development of specific virtual twin offers (e.g. gamification or digital cultural heritage content creation); support the development and offer funding for pilot projects of virtual twin destinations and offers.

Member States (MS)/Regions: Develop a digital strategy for the offer of tourism experiences and attractions at national and regional levels, which includes the recognition and visibility of companies, business, and destinations who have developed successful offers (2025); Map out existing cases of excellence at national and regional level (e.g. virtual offers / gamification) being used to boost tourism offer; assess the level of maturity of destinations and industry, in cooperation with European Commission services (2022). Support the development for digital and virtual content creation.

Destinations: NTOs / DMOs to launch the development of own virtual digital tourist offices that can be visited by tourists as an experiential virtual space. Virtual offers shall be provided by NTOs/DMOs themselves. Create at least one opportunity for experiencing local attractiveness through digital means that enrich the physical visit and activity as a pilot project, and report at regional and/or national level about results (2025); Develop a local digital strategy for the offer of tourism experiences and attractions, identifying the potential and barriers, ready to be shared and which includes an assessment of the potential support and involvement of education providers at local level (schools, universities, religious organizations, NGOs) (2022); collaborate with startups and stakeholders to identify formats for virtual experiences (e.g. gamification / virtual reality); support SMEs and sites with digital competences to develop new types of virtual experiences (i.e. not a copy of physical experience).

Industry: Develop a business plan to innovate the offer, when needed, or to overcome barriers already identified towards developing a virtual strategy that adds value to the tourism offer, while guaranteeing its sustainability and preservation of sites; develop virtual, digital and augmented reality experiences to provide a full customer journey digital tourism before/after travel; develop initiatives on a regular basis, or at least twice a year,e.g. hackathons with non-tourism stakeholders to digitalise experiences into non-tourism contexts (e.g. e-sports, gaming); digitalise touch-points of physical tourism experiences on-site (e.g. contact-less check-in, registration, AR, AI).

Investments/funding: Digital Europe, Horizon Europe, EU Regional funding, national public and private funding, flexible and immediate micro-funding

5 A smart European tourism destination

2030 Target: In 2030, Europe is known as an integrated smart tourism destination. 200 European destinations participating in a European Smart Tourism Destinations Digital Platform.

Benefits: Integrated and interconnected network of smart tourism destination across Europe. Connection of data in smart ecosystem to support management of tourist experiences and holistic local wellbeing.

By 2025: There are 100 smart tourism destinations; infrastructure development efforts are in place to close the gap of connectivity between urban and rural destinations; have a European Smart Tourism Destinations Digital Platform based on a commonly agreed set of criteria, which blends the current European Smart Tourism Capital and EDEN competition criteria, the Intelligent Cities challenges criteria, and the criteria used for national networks of smart destinations.

By 2022: Objectives and indicators of smart tourism destinations are defined. A digital mindset (data privacy, security etc.) is a common practice to increase digital technology acceptance by stakeholders and tourists, citizens adhering to experience smart destinations. Digital infrastructure / connectivity (e.g. 5G, blockchain for verification/certification) is adopted, and extended where missing. The smart destination development goes beyond cities and hotspots to include new and rural destinations to meet the needs of the new post-Covid tourist / customer.

Actions Required

European Commission (EC): Streamline the work being carried out on smart cities (Intelligent Cities Challenge, Smart Destinations, Living-in.eu) and widen the scope to as many destinations as possible; commit to gather information from MS on the general level of maturity by tourism destinations (2025). Set up a structured Digital Tourism Network and gather regular meetings (2022); Dedicated support for small scale businesses in digital and smart innovation with programmes; Promote less known/peripheral destinations and provide financial support to improve connectivity.

Member States (MS)/Regions: Map out existing cases of excellence at national and regional level of smart tourism destinations, and identify the main criteria for success; use existing and create new digital tools to support sustainable smart tourism ecosystem; develop pilot and broad scale projects in peripheral and rural destinations to be part of an integrated European smart destination; Develop the infrastructure to close the gap of connectivity between urban and rural / remote destinations, secondary cities/destinations.

Destinations: Set up education and training partnerships with local and national recognised training providers to provide staff with quality capacity building in smart living, in line with the resources provided at EU level (Intelligent Cities Challenge, Smart Destinations, Living-in.eu) (2025); Develop and uphold a smart strategy, in line with the resources provided at EU level (Intelligent Cities Challenge, Smart Destinations, Living-in.eu) (2022).

Industry: Develop and test-drive a set of incentives to give visibility to smarter and greener destinations, territories, clusters of small tourism destinations, in the offers and marketing campaigns; Provide accessible and user-friendly information and exchange best practice.

Investments/funding: Digital Europe, Horizon Europe, EU Regional funding

6 A clear regulatory framework for European tourism sharing economy platforms

2030 Target: In 2030, there exists a clear regulatory framework for 100% of tourism related sharing economy service platforms. Negative impacts of key players have been mitigated and their positive outcomes increased to contribute to value co-creation in destinations.

Benefits: Destinations are places of value co-creation among with a reduced divide between tourists, visitors, locals, empowered by digital platforms. There is a recognition for new types of tourism (e.g. telework tourists, digital nomads) that are supported by new digital business models.

By 2025: Have a flourishing competition while protecting the uniqueness of European accommodation types; have a regulation and regional/local execution of EU short term rental policies in place; There is a reduced divide between locals and tourists by co-using digital tourism-related services and offers platforms.

By 2022: An agenda for a clear EU regulation on short term rentals is proposed to tackle the lack of a level playing field between STR and traditional accommodation providers, market access, regulatory fragmentation that creates challenges for tourism providers (e.g. professional vs. occasional hosts), platforms, and local authorities; have customer awareness in consumption choices with regards to who and what they are buying. Have launched a public consultation to develop a roadmap of clear factors that need be included in the regulation.

Actions Required

European Commission (EC): Lead the development of a EU short term rental (STR) regulation policy. Clarify responsibilities, rules, liabilities and eliminate frustrations. Build upon existing frameworks and initiatives.

Member States (MS)/Regions: Implement EU policies on the regulation of short-term rentals; create peer-to-peer mechanisms for public participation in tourism decisions.

Destinations: Make sure the authenticity of sites and local culture is preserved; create spaces and experiences that bridge the gap between locals and tourists for co-participation and value co-creation.

Industry: Create a fair balance between the tourism ecosystem players; contribute in-rule setting and following by platform economy associations. Promote transparency for customer awareness in purchasing and decision marking processes (e.g. who / what they are buying from).

Investments/funding: Digital Europe, EU Regional funding

7 Digital destination innovation hubs

2030 Target: In 2030, at least 75% of regional DMOs have a digital innovation hub, 100% of NTOs have a digital innovation hub. This lab is the infrastructure for full-scale digital tourism competence, including digital infrastructure and employees with digital competence to have achieved a technology proficiency level of specialist capability to deal with data;

Benefits: NTOs and regional DMOs have digital infrastructure and human capability to run digital knowledge hubs for all stakeholders; tourism providers have a one-go-to-place for specialist digital tourism competences needed (e.g. data, AI, blockchain, robots, software prototypes) to improve tourism experiences.

By 2025: At least 40% of regional DMOs achieve technology proficiency level; Destination hubs are connected to the European data space network and to regional digital satellite hubs in a destination;

By 2022: 10% of regional DMOs have a minimum of 1 digital knowledge contact person; destinations have an easily accessible and easy-to-use data dashboard.

Actions Required

European Commission (EC): Set goals and guidelines of interoperability / one stop framework for the development of digital tourism knowledge hubs across European destinations.

Member States (MS)/Regions: Provide fiscal incentives/lower costs of employing staff; introduce standard rules linking any incentive to the adoption; support the development of digital innovation hubs in collaboration with national NTOs / DMOs; NTO/DMOs shift focus from marketing promotion to innovation. National cross-industry innovation hubs are established to foster holistic innovation and connection with other key stakeholders to deal with non-sector specific data. Establish cooperation with data experts outside tourism to kick-start and accelerate data usage and management short-term and to support the development of in-house data competences and offer these on national / regional destination innovation hub levels long-term.

Destinations: NTOs to establish destination hubs, collaborate with non tourism-stakeholders and support the development satellite hubs on a regional level. Develop tourism data dashboards/databases in digital destination knowledge hubs and connect these with the European shared data space.

Industry: Connect with digital innovation hubs for experience management and collaborate with other stakeholders for digital prototype creation in hubs.

Investments/funding: Digital Europe, Horizon Europe, EU Regional funding

8 Digitally equipped tourism SMEs and workforce

2030 Target: In 2030, 90% of tourism SMEs have reached a basic level of digital intensity and participating in the digital value chain of tourism (e.g. have an online presence).

Benefits: Digital empowerment is a horizontal key enabler for the digital transition. Tourism providers, SMEs and individuals in the tourism workforce are equipped with the necessary digital skills to participate in digital tourism activities.

By 2025: There are a formally recognized training and annual courses by tourist destinations updating the digital skills of human resources working in the tourism sector; have developed a defined set of indicators to monitor the digital maturity of tourism SMEs (basic and advanced skills); have a tourism digital apprenticeship across Europe;

By 2022: 75% of the tourism SMEs have their own website or participate in existing online thematic platforms; A pilot of tourism digital apprenticeship programme is launched; A specific definition of digital competence for tourism workforce is defined based on DIGCOMP; Existing schemes and initiatives are used (e.g. Enterprise Europe Network, among many others) and best practices across industries/sectors, learn from their structures and develop content.

Actions Required

European Commission (EC): Promote lifelong learning by offering advanced training schemes for a digital workforce across the tourism value chain; provide micro funding; develop startup innovation challenges; focus on training of non-digital-native companies; support the development of a digital apprenticeship framework; ensure easy and non-bureaucratic access to funding. Awareness campaigns to attract tech-talent to the tourism industry as an employer.

Member States (MS)/Regions: Develop national awards for best teaching approaches and resources for digital skills in tourism; support SMEs with financial and organisational support for training and education on digitalisation; develop and update vocational and university tourism curricula for digital tourism competences; create an assessment methodology for monitoring of skilling needs; Create funding with ease of access for SMEs. Ensure diversity in digital empowerment and training (e.g. empowering female leadership).

Destinations: Use tax credit towards digital empowerment; coordinate digital skills development needs and organise targeted trainings; Digital destination innovation hubs are the main infrastructure to support tourism SMEs employees with basic and advanced knowledge and training; set up education and training partnerships with local and national recognised training providers (e.g. universities, institutes) to provide staff with quality capacity building in data sharing and good practices, based on the material made available by the European Commission on Smart Destinations.

Industry: Raise awareness among tourism SME management about the importance of digitalisation; micro funding for SMEs to develop attractive tourism websites as a first gateway effort into more advanced digitalisation; train all tourism employees for basic digital competences, and have 1 advanced digital specialist (e.g. AI, data, blockchain); Provide micro funding through representative organisations/associations. Create cooperation with educational institutions / universities of applied sciences to increase the need for specialist skillsets for a new generation of tourism workforce.

Investments/funding: Digital Europe, EU Regional funding, Erasmus+

Resilient Transition
Prof. Ko Koens

Nine transition pathway topics are outlined below as part of the   transition pathway. They describe how, by 2030, DMOs have become collaborative innovation organisations, which bring together tourism stakeholders, residents and other relevant actors. Tourism organisations increasingly provide services to residents or engage more with local stakeholders in other ways to ensure tourism supports residents and visitors alike. New business models have been developed that allow for stronger interaction with the locality, and that support resilience in case of sudden changes in tourism markets. Accessibility of destinations and facilities have improved significantly, while safe and sustainable transport infrastructure and mobility options have been developed. All tourism stakeholders will take action to increase their adaptive capacity with regards to climate change and/or mitigating climate impacts. A European system to measure the social impacts of tourism (governance) will be used in all member states and heavily visited destinations, while peer learning platform will exist to facilitate the sharing of best practices and learning experiences. People involved in tourism will have the possibility to or already to participated in training on topics of their choice. Quality of work and opportunity for growth within the industry are guaranteed, taking into the notion that different individual perspectives with regards to quality of work.

1   DMOs have become collaborative innovation organisations

2030 Target: In 2030 all DMOs, which are funded by government for more than 65% of their income, have expanded their profile from being a marketing organisations to becoming collaborative innovation organisations, which work together with public and private stakeholders, residents and relevant actors outside tourism sector, to jointly create a more resilient tourism

Benefits: More efficient linkages between all relevant stakeholders, improved long-term benefits for the service providers, destinations and residents

By 2025: All destinations with high seasonality or high tourism intensity have published their stakeholder engagement strategies; DMOs in 50 largest tourism destinations have created an overview of the most important tourism stakeholders and stakeholders from outside of tourism, EC has mapped DMOs systems across EU (incl. e.g. financing, structure), which may be used for benchmarking and finding best practices.

By 2022: 80% of all destinations with high seasonality or high tourism intensity have mapped out stakeholders. European wide compendium of best practices with input from at least 30 destinations has been created

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Actions Required

European Commission (EC): Facilitate knowledge sharing between MS/regions, coordinate mapping of DMOs.

Member States (MS)/Regions: Technical assistance for collaborative destination strategy development with civil society included, coordinated best practice exchange between destinations, also at local and regional level; incentivise change to change of DMOs.

Destinations: Collaborative workshops for stakeholder mapping and strategy development; discussion on changing DMO structure, provide best practices of DMOs who are leading on this.

Industry: Active participation in destination strategy and MS/regions development and governance .

Investments/costs: National/regional funds to provide technical assistance and seed money for destinations (linked with ERDF, National RRPs)

2   Tourism has positive social impact on visited communities

2030 Target: In 2030 there is a European system to measure the impacts of tourism (governance) on the life of inhabitants. This is used in all member states at a destination level, as well as in all tourism destinations with tourism intensity of 2 or higher

Benefits: If tourism has positive social impacts, it contributes to local environments and economies. This will also lead to more enriching and rewarding experiences for visitors

By 2025: Set of indicators to measure the impacts of tourism on quality of life of inhabitants have been developed and piloted in at least 10 Member States

By 2022: Set of innovative indicators to measure KPIs for the impact of tourism on the quality of life of people have been developed

Actions Required

European Commission (EC): Work with Member States, destinations and on the rollout of a common European system to measure tourism and quality-of-life in member states – building on existing systems and observatories and experiences from social economy.

Member States (MS)/Regions: Include social and environmental indicators to measure the impact of tourism on quality-of-life in national statistics and regional services.

Destinations: Integrate indicators of (experienced) tourism impacts in (bi)annual resident surveys and initial survey of local issues in destinations is performed. Experienced destinations can support others to stimulate best practice.

Industry: Engage with host communities to clarify where and how industry can bring social benefits. Provide transparent and comparable (to companies in similar field of work) social impact assessment, as part of obligatory CSR reporting for larger tourism companies (also based on aforementioned indicator system).

Investments/funding: Horizon Europe, EU Regional funding, Digital Europe

3 Tourism services and facilities accessible to all

2030 Target: In 2030 70% of common destinations are accessible to all, including silver economy and persons with lower incomes, environmental allergies) either by facilities or special customer service. Services provided by tourism providers and their facilities are accessible to all, including persons with disabilities (directly or via additional customer service), while safe sustainable transport infrastructure and mobility options help make remote regions more accessible and increases sustainable mobilities within destinations

Benefits: Greater tourism accessibility allows more consumers to enjoy tourism experiences and increases the potential market for tourism providers, especially as the EU population is aging. Accessible tourism to all will help maintain an adequate offer. It also can contribute to the development of off-seasons

By 2025: Persons with disability or from a minority ('equality' representative') to be represented in the board of the 50 largest EU tourism businesses; inclusivity and accessibility strategies part of CSR reporting of these companies to ensure awareness throughout the organisation

By 2022: 95% of all working in tourism is aware of need for an accessible and inclusive approach. Each destination has a professional dealing with accessibility issues

Actions Required

European Commission (EC): Explore implementing the European Disability card at the EU level (action also stands for member states).

Member States (MS)/Regions: Set up and/or promote quality system for standards for accessibility. Awareness raising with regards to the importance of accessibility and being welcoming to all (including e.g. LGBTQI community).

Destinations: Provide facilities to make destination more accessible and increase their visibility. Awareness raising towards their destinations with regards to the importance of accessibility for all – promote and share good practices.

Industry: Increase inclusive marketing and increase accessibility of services and facilities; develop monitoring system to collect data on actual accessibility and facilities (of all different kinds) for accommodation and other tourism services .

Investments/costs: European Fund for Strategic Investments, COVID recovery funds, Private funding

4   Peer learning database of best-practices, including learning experiences

2030 Target: In 2030 a European-wide peer learning platform exists that facilitates an active online community of tourism stakeholders and provides knowledge of 'best-practices' and learning experiences with regards to projects/interventions, forms of management and innovations that make tourism more resilient.

Benefits: All stakeholders can learn from good practices and encountered issues elsewhere

By 2025: An institutionalised peer learning platform exists with best practices and learning experiences at different levels (European, National, Regional, Destination, Industry)

By 2022: Peer learning platform for best practices and learning experiences and benchmarking between destinations has been developed and is ready to be piloted in at least 3 member states; On/offline platform has been developed at the same time to discuss and share experiences around and interact with peers to find novel solutions

Actions Required

European Commission (EC): Launch call to action to share best practices – facilitate setting up of database and EU wide knowledge sharing facilities that will display best practices and learning experiences; map all existing learning platforms from Interreg or other EU projects (e.g. Mitomed).

Member States (MS)/Regions: NTOs to set up programme to collate best practices and learning experiences on national level and format these in a way that fits with learning platform .

Destinations: DMOs to collate best practices and learning experiences on destination level and format these in a way that fits with learning platform.

Industry: Collate best practices (incl. social economy) and learning experiences on industry level with DMO and format these in a way that fits with learning platform.

Investments/costs: Horizon Europe, National funds, Structural funds

5 Tourism supports residents and visitors alike

2030 Target: In 2030 the tourism ecosystem is recognised for its contribution to the well-being of residents and visitors alike. 70% of tourism organisations provide services also to residents, or engage with them indirectly by stimulating more local supply-chains, helping to improve the quality of spaces or 'solving' issues that are not apparently related to tourism (e.g. fighting loneliness) 70% MS have framework that stimulates tourism to provide benefits to residents

Benefits: A greater diversity of services, stakeholders and customers allows for greater dexterity and greater adaptive capacity if tourism demand suddenly drops. This will make it easier for businesses to survive and reduce issues related to tourism ending in times of crises

By 2025: 70% of major tourism businesses report on the extent to which they serve residents or provide other 'services' to society and report on these in their CSR reports; 20% of tourism offer includes experience that stimulates interaction between local businesses and visitor (e.g. New Urban Tourism; creative tourism). For smaller businesses the DMOs can take the lead on this.

By 2022: DMOs and destination policymakers engage with stakeholders outside of tourism (e.g. digital twin, mobility), to result in report on how (different forms of) tourism can provide services to local users of the destinations

Actions Required

European Commission (EC): Coordinate with other DGs regarding the importance of tourism and set integrated tourism resilience on political agenda.

Member States (MS)/Regions: Coordinate with destinations to appreciate how much local, regional, domestic and international tourism takes and relate this to potential positive and negative impacts - this should serve as an overview as to what is a healthy mix of local/regional domestic and international tourism in different types of destinations.

Destinations: Develop tourism policy in collaboration with other departments (zoning, infrastructure, housing, environment). Support stronger links between tourism industry and local producers and recognise and support local producers to increase access tourism markets. Engage with social economy enterprises, also as best practices.

Industry: Diversify products to suit both local users and visitors, for example by focusing on 'authentic tourism' like New Urban Tourism, or creative tourism practices. Stimulate local producers to engage with tourism supply chains.

Investments/funding: EU Regional funding, European Fund for Strategic Investments, Private funding

6   Diversified business models support resilience

2030 Target: In 2030 All destinations have strategies that consider different target audiences, for different types of tourism activities and seasons and host a diversity of tourism organisations that accommodate such a strategy using different types of business models (incl. those relating to social economy)

Benefits: Diversification of business models supports resilience of the destination in case of sudden changes in tourism markets

By 2025: All MS have national tourism strategies based on an analysis of key marketing segments and business models for most important tourism destinations, considering new trends in tourism and highlighting the specific cultural and natural strengths of the destinations

By 2022: Published best practices of holistic destination strategies that consider diversified business models for new types of tourism are shared on European best practice platform

Actions Required

European Commission (EC): Invite publication of best practices of advances destinations with sustainable and resilient tourism strategies.

Member States (MS)/Regions: Ensure all destinations to revise their tourism strategies considering new demands and trends of tourism, considering the cultural, sustainability and resilience objectives of the destinations.

> **Destinations:** Analyse the strengths, weaknesses, threats and opportunities of the destination in the light of new trends in tourism and develop a forward-looking strategy that allows for thriving destinations where tourism contributes to the quality of the place and quality of life.
>
> **Industry:** Collaborate with DMOs in developing innovative and forward-looking business models and tourism strategies.

Investments/funding: NRRPs, Regional funding

7   Tourism has adaptive capacity to cope with impacts of climate change

2030 Target: All tourism stakeholders have taken action to increase their adaptive capacity with regards to climate change and/or mitigate negative impacts in the context of tourism

Benefits: Greater adaptive capacity and clear contingency plans make it easier to address the issues relating to the climate crisis and allow for a quicker start-up of tourism following a crisis.

By 2025: All tourism authorities at MS level, regions and destinations have, in collaboration with industry, published a plan of action with regards to expected climate change adaptation in their locality (country, region, destination), aligned with Glasgow Declaration

By 2022: There will be a European plan and roadmap for increasing adaptive capacity to deal with climate change, including low-carbon intra-European tourism and aligning sustainable mobility with tourism mobility

> ## Actions Required
>
> **European Commission (EC):** Coordinate European crisis contingency governance framework which includes a steering taskforce that identifies and presents coordinated actions and a political taskforce that promotes engagement and high-level decision-making; support development of European tourism climate change adaptation response system. Encourage climate change adaptive tourism, also by means of best practices (or labelling/promotion; also discussed in green transition pathway).

Member States (MS)/Regions: Coordinate and facilitate the design of actions for destinations and industry. Set up local/regional networks for the purpose of building coalitions that will limit negative fallout from crises. Create legislation to only provide immediate financial support to stakeholders with active strategy to mitigate crises and increase adaptive capacity). Provide incentive to stimulate climate adaptive initiatives. (financial/labelling).

Destinations: Seek public-private and private-private cooperation mechanisms/protocols with tourism industry to deal with the consequences of disasters due to climate change and/or human action and jointly develop action plans, also based on SECAP model.

Industry: Identify the potential risks associated with climate change and for business and take measures how to deal with this. Diversify target market (EU and local tourism) to ensure a matter of financial stability, also without (certain groups of) tourists .

Investments/funding: Recovery and Resilience Plans; climate change prevention and mitigation funding

8 Tourism allows for positive career paths, a high quality of work and well-being of employees

2030 Target: All members states have regulation in place to guarantee workers' rights, quality of work and opportunities for growth within the industry, taking into account different individual perspective on what quality of work may be.

Benefits: The ability to have a career in tourism can mitigate people leaving tourism early, while happy employees lead to better customer experiences

By 2025: EU collaborates with Member States, trade unions, industry and representative of social economy to improve quality of work in tourism, also with a focus on innovative approaches to employment to result in an action plan. Preparation for EU-wide collaboration on national regulation for dealing with short- and temporary work contracts has been done, with a specific focus on ensuring protection of 'vulnerable' people from the workforce and the aim to ensure better qualified jobs

By 2022: 30% of NTOs publish action plan to ensure good quality of work, and plans to ensure good quality of work for a post-COVID recovery

Actions Required

European Commission (EC): Strategies addressing the potentially precarious working situation of platform workers following existing consultation, also with an eye on future EU wide national regulation; support protection of the right to join trade unions throughout the EU. Engage also with DG employment.

Member States (MS)/Regions: Develop employment legislation to improve quality of work for those in a vulnerable position; provide protection to union members from discrimination and victimisation. Review legislation with sesasons employment in mind.

Destinations: Promote social dialogue by stimulating involvement of tourism workforce in decision-making processes on tourism in the destination.

Industry: Set up a recognizable standard of quality of work that allows those working in tourism to thrive and as sector agree to make this an obligatory part of CSR report to increase transparency; increase supply chain transparency; measure work environment performance and work stress, identify underlying causes and deal with these.

Investments/funding: COVID recovery funds, Cosme; SURE

9 Training and upskilling/ reskilling options available for tourism workforce (Pact for Skills in Tourism fully implemented)

2030 Target: All people involved in tourism are given the option and 80 % of the tourism workforce has participated in training, 20 hours per tourism worker per year, excluding formal education; workers have liberty in choosing training and are equally stimulated to develop soft skills to ensure there is a positive attitude to training

Benefits: Upskilling increases opportunities for tourism workforce, which may keep them employed in tourism for longer and able to provide better services. Higher skilled staff is good for MS as well

By 2025: Set up research and skills development programmes in every member state; Increase the up/reskilling participation to 40% for the employed workforce, and by 80% for unemployed

By 2022: Set-up of regional and/or national Skills Partnerships with participation of all stakeholders (industry, social partners, training providers, destinations, governments) in all tourism regions also to critically engage with current offerings and discuss with workers what specific skills they believe they need.

Actions Required

European Commission (EC): Support and seek resources for easy access to skilling approaches, including soft skills, by facilitating skills partnerships, particularly those aimed at SMEs.

Member States (MS)/Regions: Increase the number of successful training certifications by 10% per annum ; annual revision and update of skills demand and development per region National Tourism Strategies (underpinned by financial commitments) to include (soft) skills development.

Destinations: Identify skills needs among destination stakeholders and create synergies and linkages with potential providers of skills. Skills development programme where tourism stakeholders engage with others, also to support hospitality training of others.

Industry: Training/education and up/reskilling of 10% of the tourism workforce each year starting in 2022 until 2030 to tackle the skills gaps in the tourism ecosystem both for the current workforce and new entrants. Learn from best practices on guaranteed workplace after training to allow for unemployed or disadvantaged groups to become active (again) in the sector. Establish Public Private Partnerships geared towards upskilling/re-skilling (also look at Next Tourism Generation). Engage in dialogue with workers in the social context .

Investments/funding: Recovery & Resilience facility fund; ESF, Cosme, Horizon 2020, ERDF, Pact for skills

Acknowledgements

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WE THANK YOU FOR YOUR SUPPORT IN OUR EFFORTS TO CONTRIBUTE TO THE CO-CREATION OF THE TRANSITION PATHWAY FOR TOURISM, FOR A MORE SUSTAINABLE, INNOVATIVE AND RESILIENT TOURISM ECOSYSTEM.

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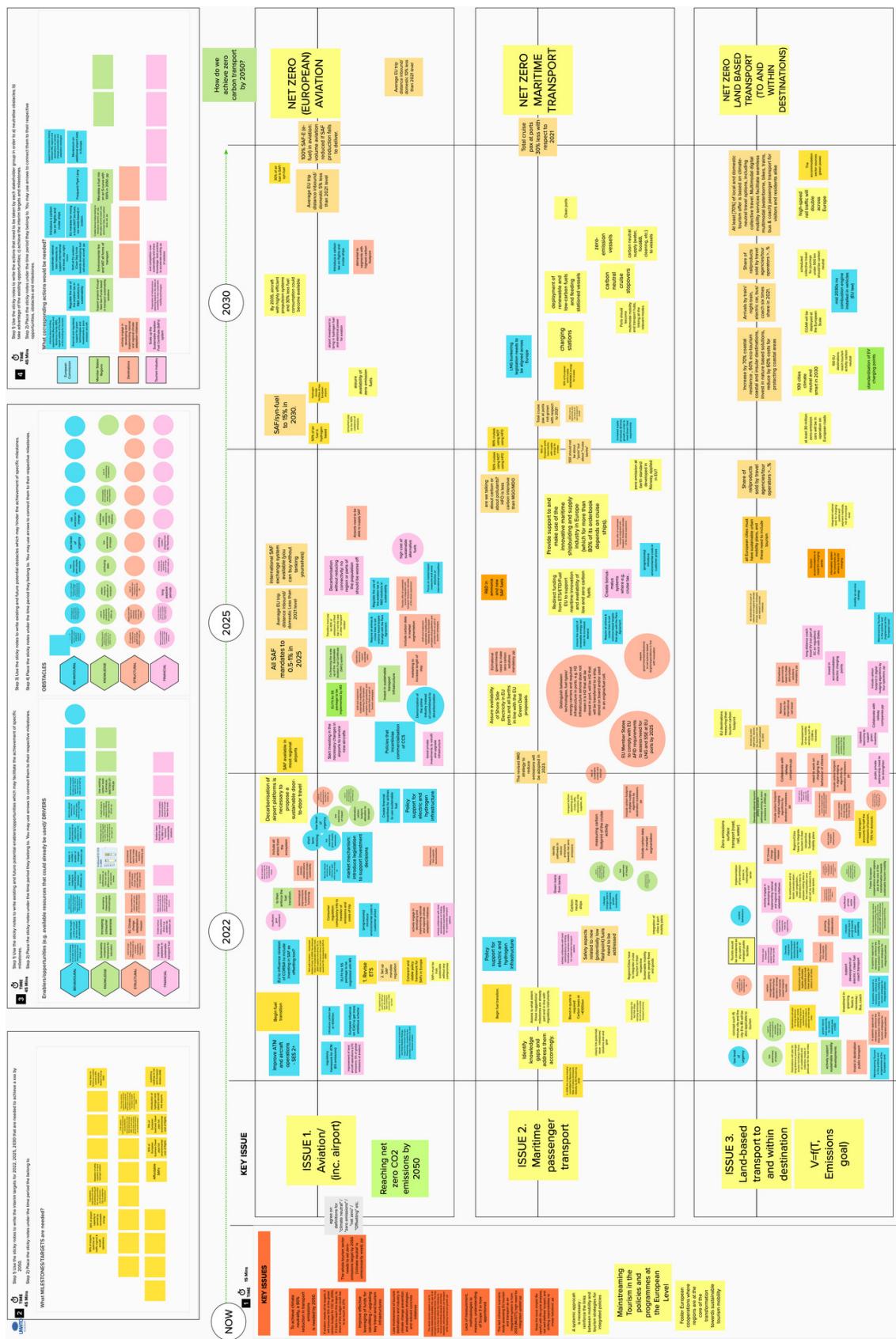
European Commission - General enquiries:
EU-TOURISM-PATHWAY-2030@ec.europa.eu
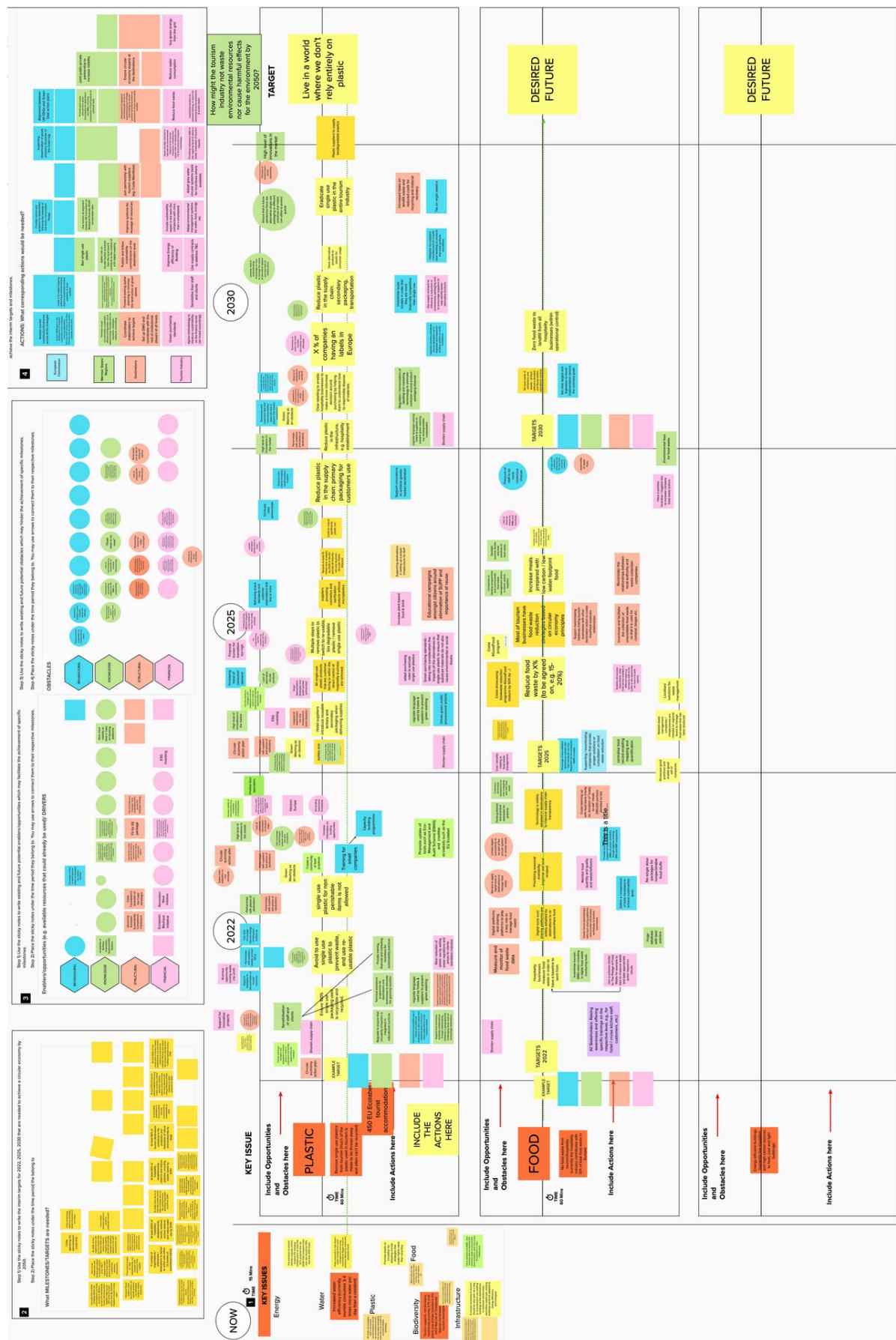
Annex 1
## Mural Green Transition
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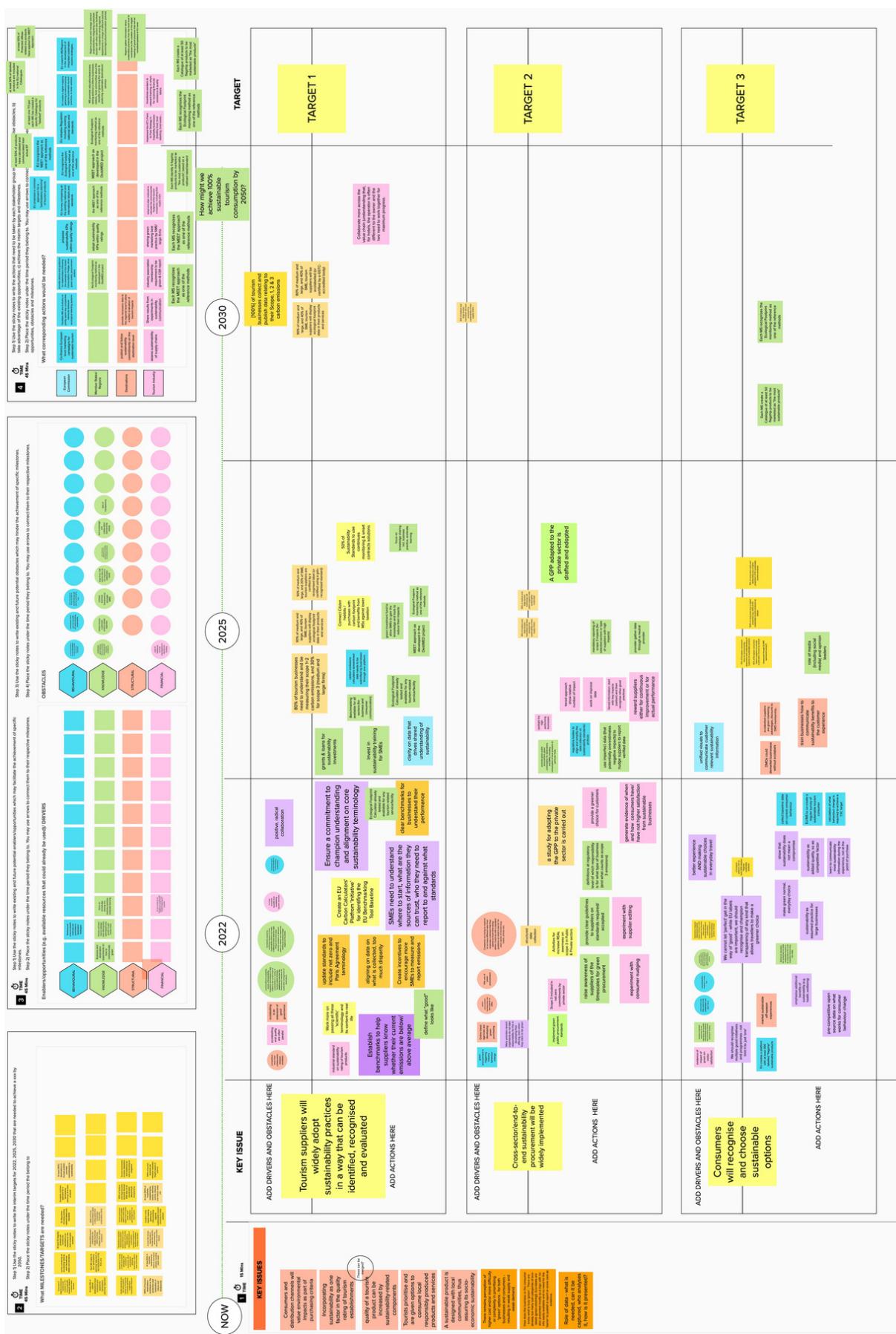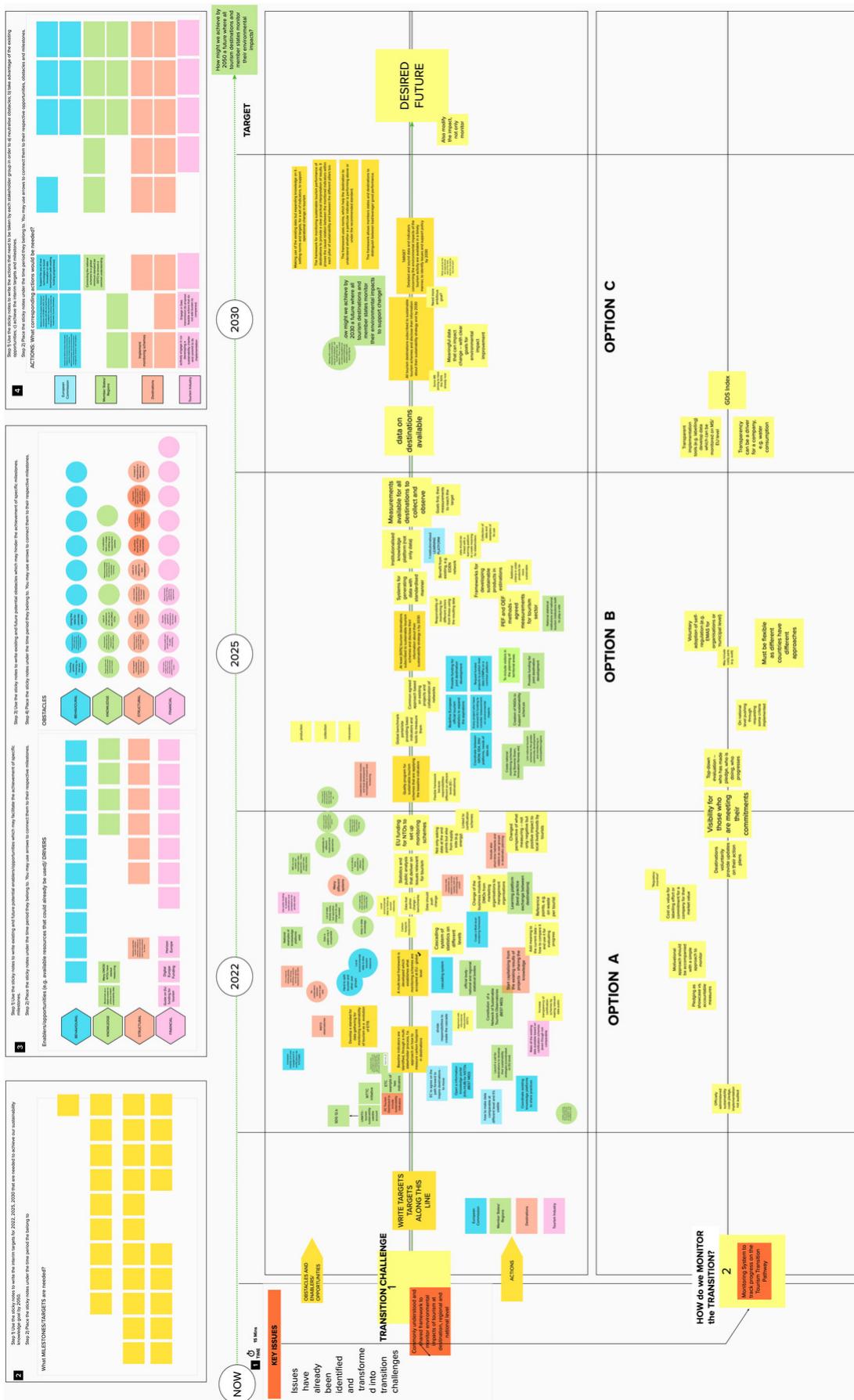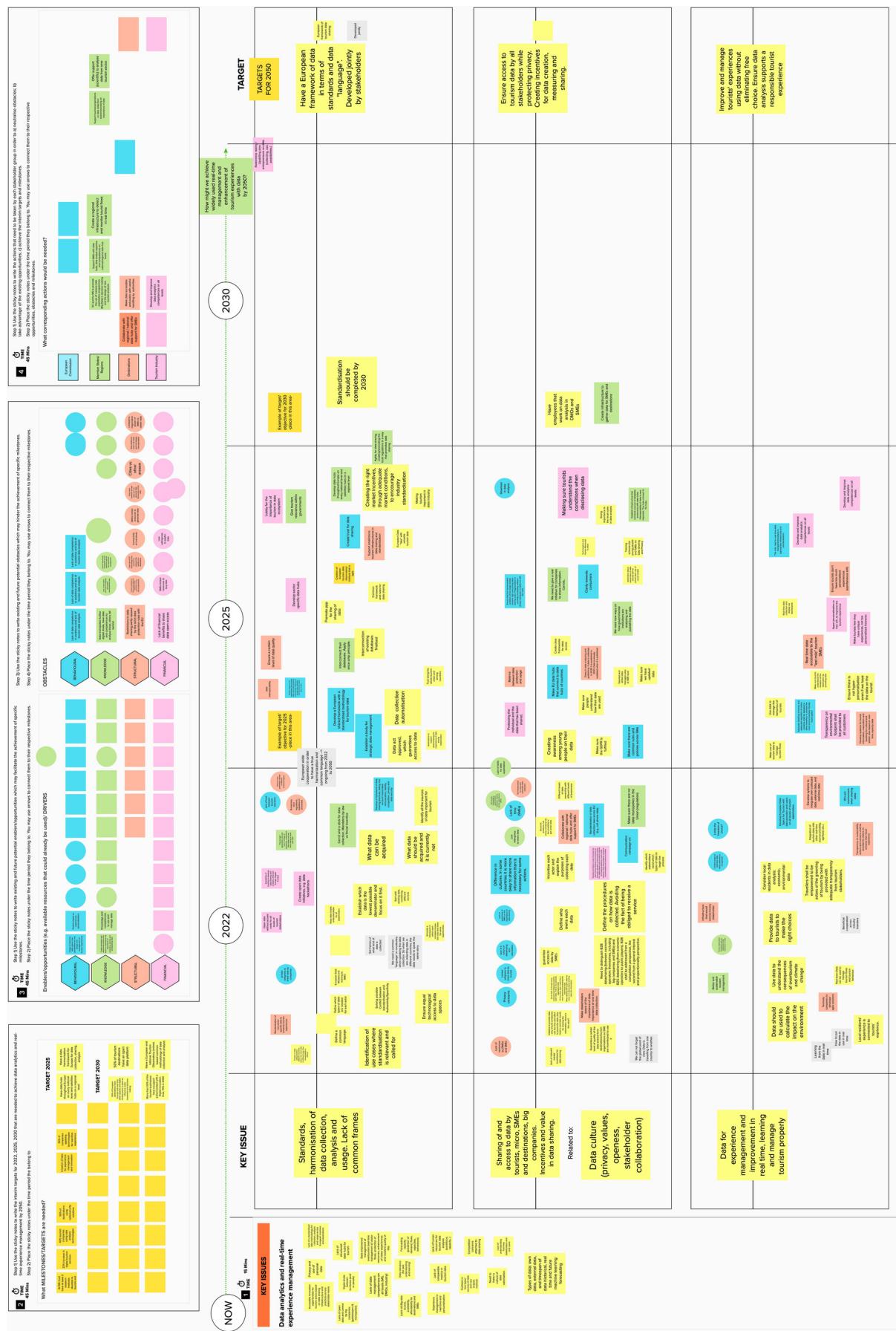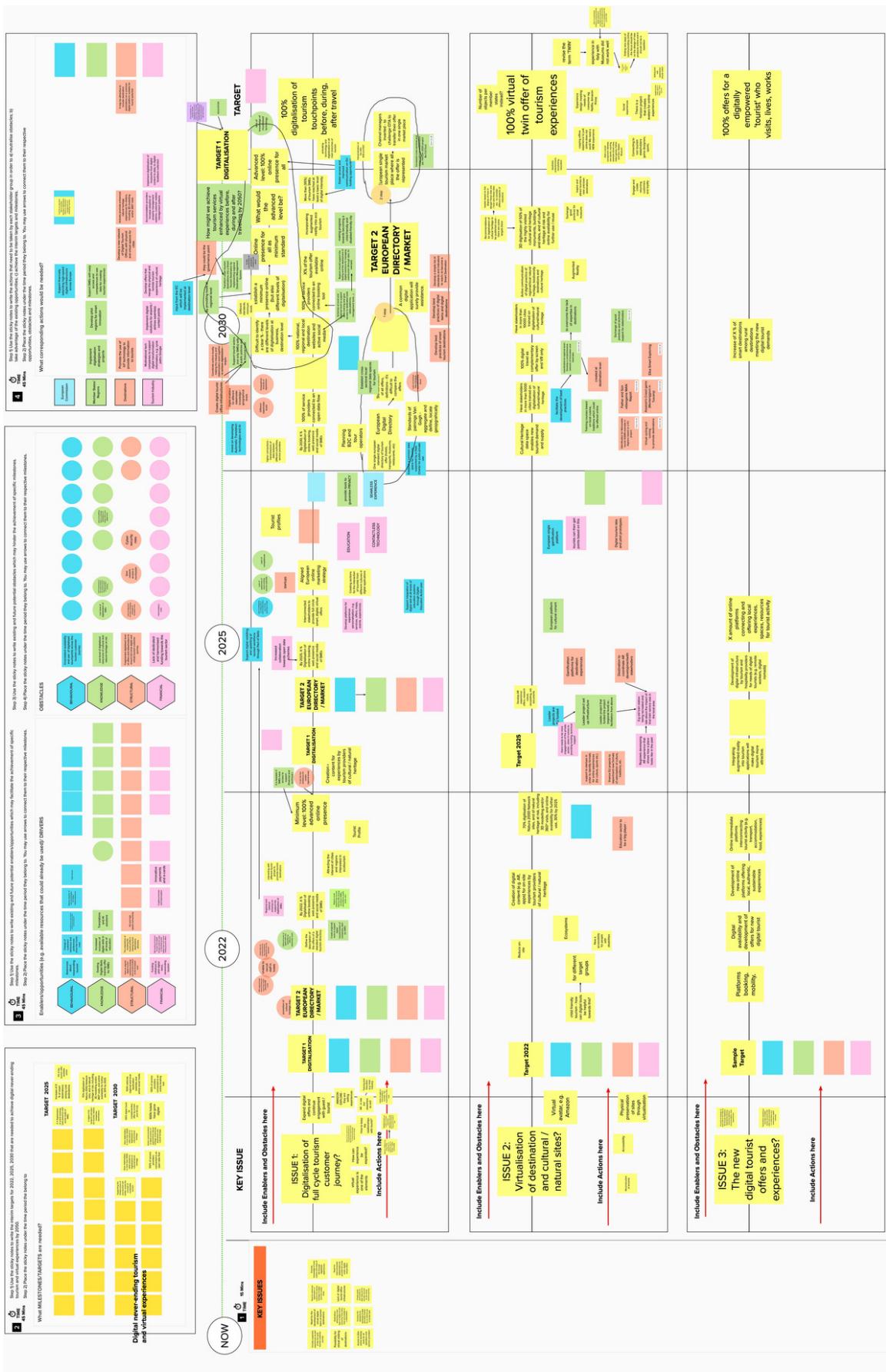
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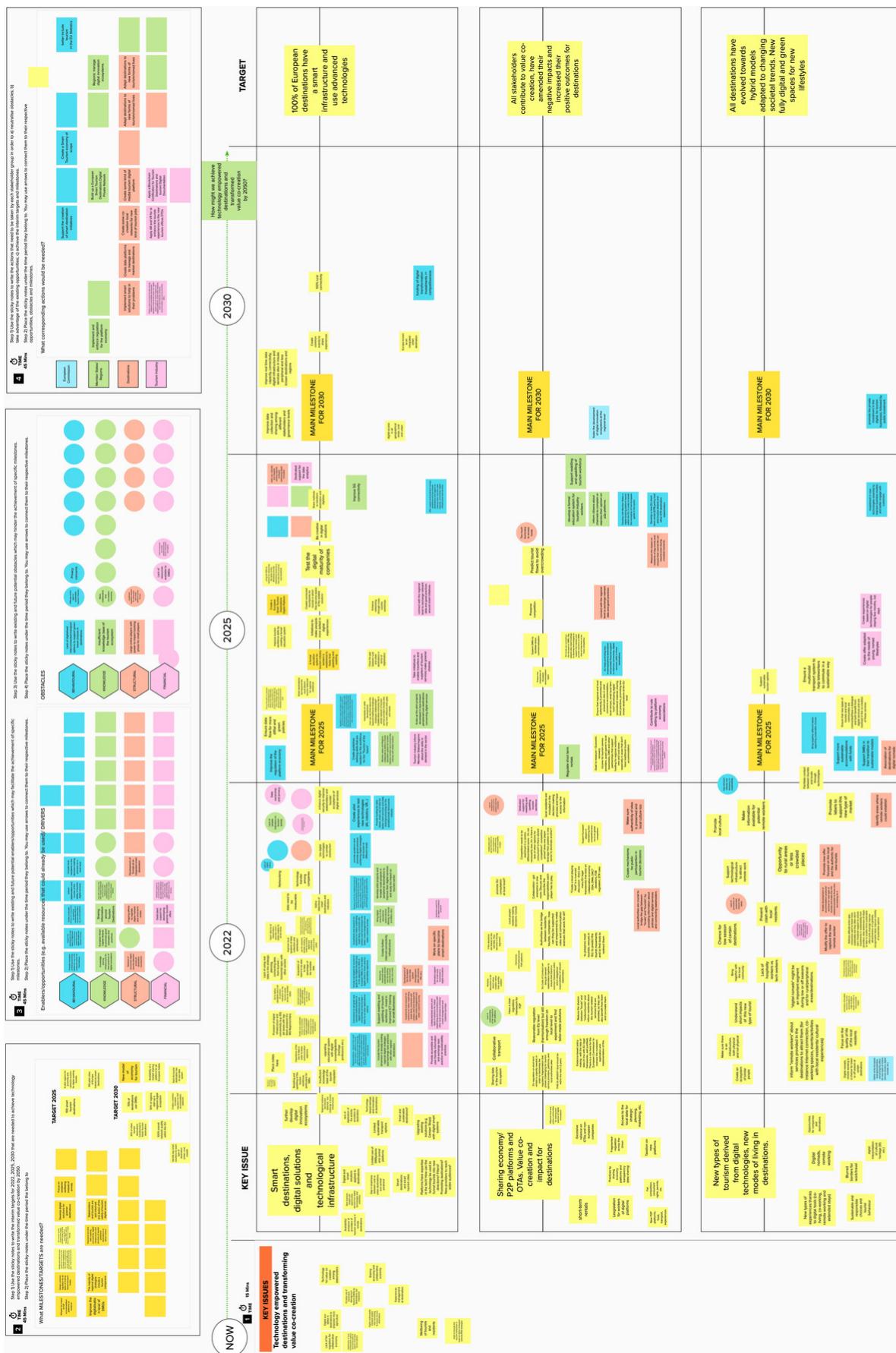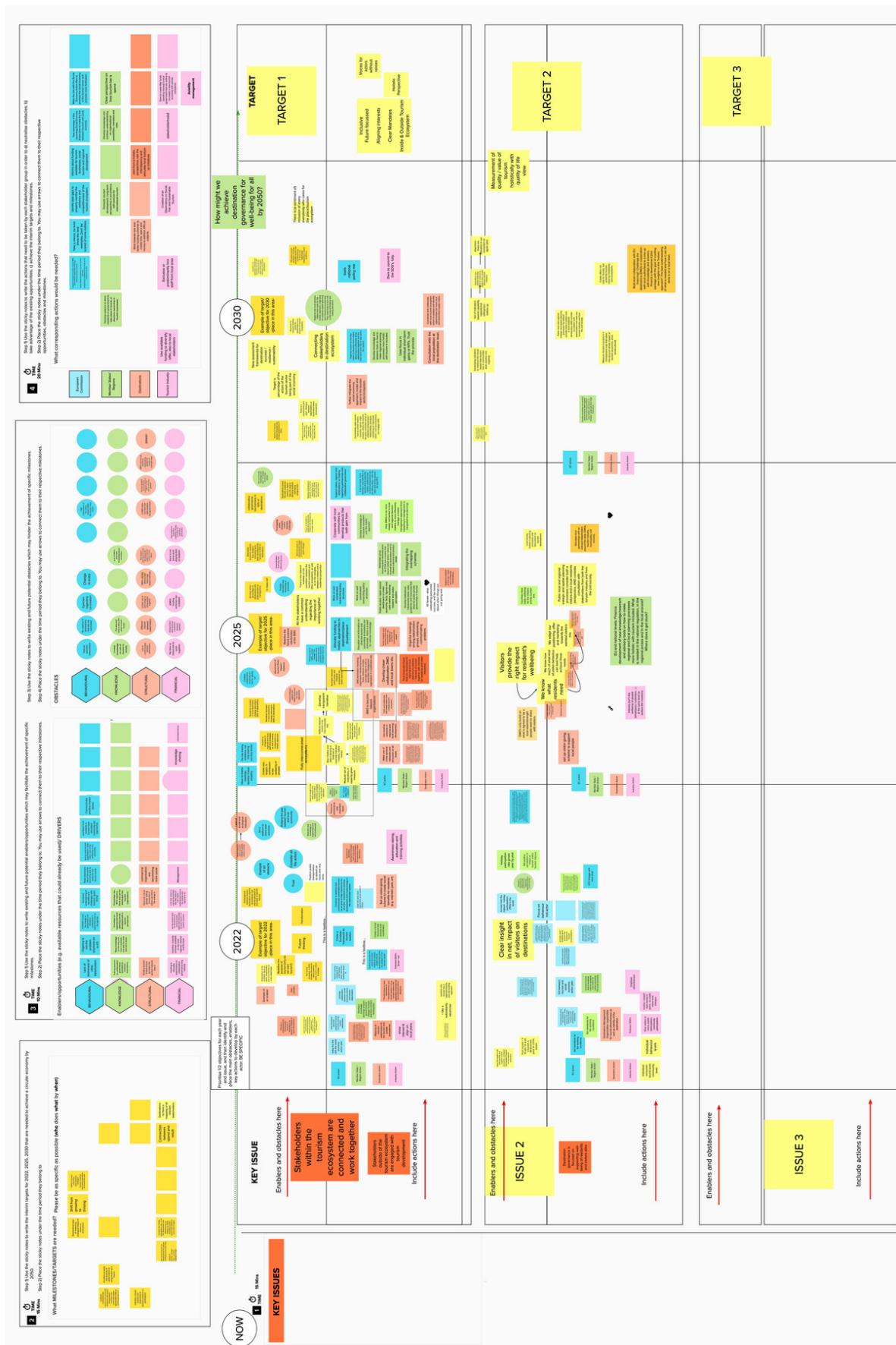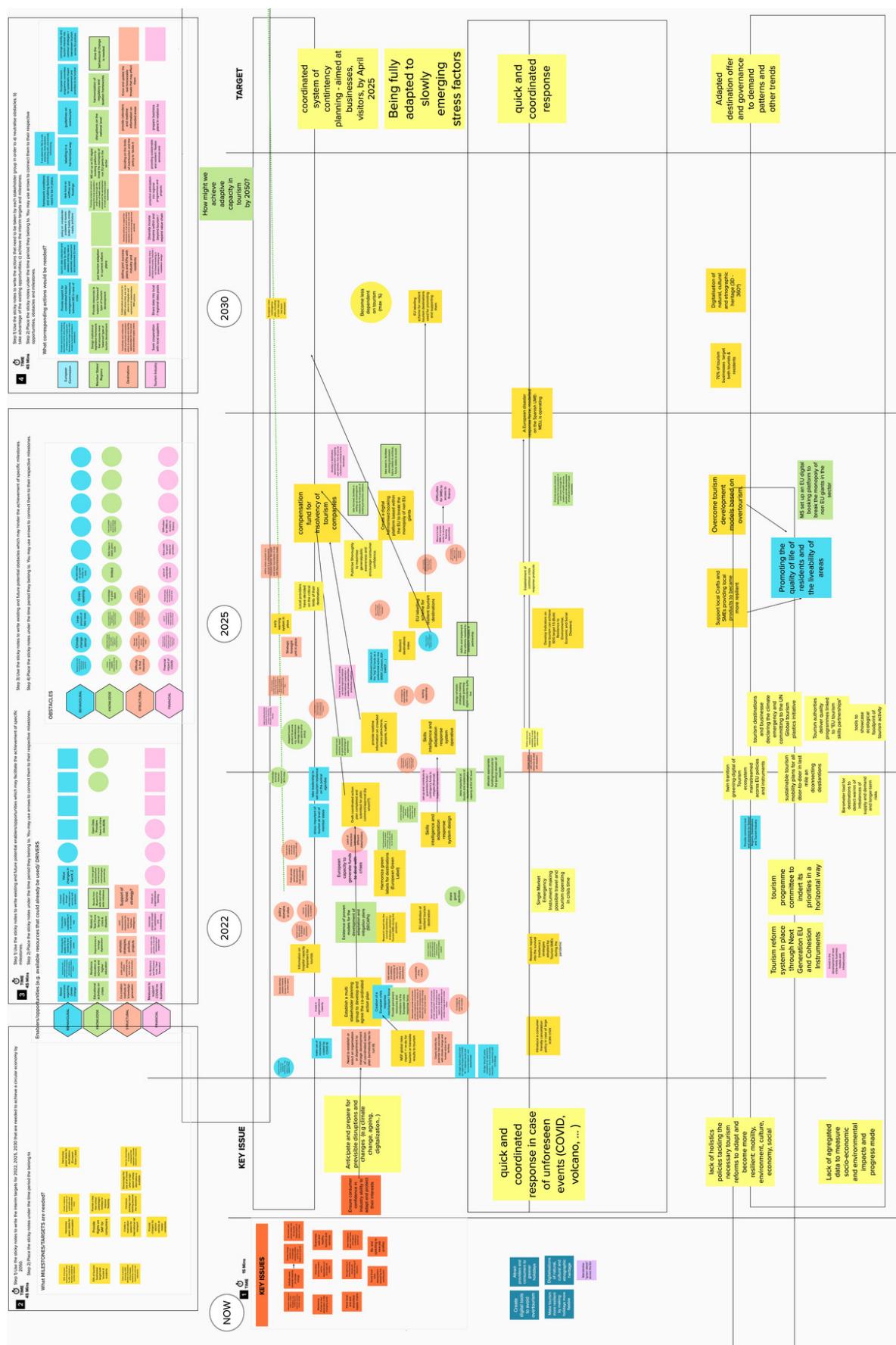
Mural Resilient Transition
Workshop 3.1. Destination Governance for Wellbeing

Annex 2
Green Transition
Stakeholder's Voting Results

	1 Governments produce and use sustainable tourism data and indicators to inform policy	2 Governments implement National Sustainable Tourism Schemes	3 Organisation measure and report their environmental performance	4 Reaching net zero tourism transport emissions by 2050	5 The tourism industry has renovated, energy efficient buildings	6 Circularity for plastics in tourism is common practice	7 Tourism/hospitality organisations reduce food waste	8 Tourism benefits are part of plans to increase biological protection, diversity, and conservation	9 Organisations apply green procurement standards	10 Consumers purchase green products
FEASIBILITY AVERAGE										
1. How feasible is the target for 2030? (5 - Very much feasible, 1 - Not at all feasible)	3.0	3.9	3.7	3.7	3.8	4	4.2	3.2	4.1	3.7
2. How feasible is the milestone for 2025? (5 - Very much feasible, 1 - Not at all feasible)	3.0	4.1	3.8	3.9	3.6	3.8	4.1	3.4	3.9	3.7
3. How feasible is the milestone for 2022? (5 - Very much feasible, 1 - Not at all feasible)	3.3	4.3	3.9	3.4	3.7	3.3	4.2	3.4	3.6	3.9
4. How feasible is it for your organisation to implement the actions suggested? (5 - Very much feasible, 1 - Not at all feasible)	3.4	4.2	4.2	3.6	2.7	3.8	3.9	3.8	4.2	3.1
FUTURE WORK (%) 5. Are you going to increase your work on this topic between 2022 and 2025?										
1 – No, we do not plan to increase our work on this topic	11%	0%	0%	0%	20%	0%	8%	14%	0%	0%
2 – We aim to increase work on this topic but do not yet have an approved plan	11%	10%	10%	17%	30%	0%	17%	14%	0%	20%
3 – We will increase work on this topic as per our approved plan/strategy, following our targets already set	0%	20%	30%	28%	10%	15%	17%	21%	27%	20%

Green Transition
Stakeholder's Voting Results

	1 Governments produce and use sustainable tourism data and indicators to inform policy	2 Governments implement National Sustainable Tourism Schemes	3 Organisation measure and report their environmental performance	4 Reaching net zero tourism transport emissions by 2050	5 The tourism industry has renovated, energy efficient buildings	6 Circularity for plastics in tourism is common practice	7 Tourism/hospitality organisations reduce food waste	8 Tourism benefits are part of plans to increase biological protection, diversity, and conservation	9 Organisations apply green procurement standards	10 Consumers purchase green products
4 – It is possible to revise our plan/strategy to meet the targets set in the EC transition pathway	33%	40%	20%	28%	30%	38%	33%	21%	55%	10%
5 – Our plans are already aligned with the targets set in the EC transition pathway	44%	30%	40%	28%	10%	46%	25%	29%	18%	50%

COSTS/BENEFITS (%)

6. Do you think the costs/investments needed from your organisation to implement these actions will be compensated with respective benefits?

	1	2	3	4	5	6	7	8	9	10
1 – Not compensated with respective benefits even in the long term	22%	0%	0%	6%	10%	0%	0%	0%	0%	0%
2 – Only partially compensated	11%	0%	0%	0%	20%	15%	17%	29%	0%	20%
3 – Not sure if compensated	33%	10%	40%	56%	30%	38%	8%	14%	36%	10%
4 – Mostly compensated	0%	50%	30%	22%	20%	15%	42%	36%	27%	20%
5 – Fully compensated with long-term benefits	33%	40%	30%	17%	20%	31%	33%	21%	36%	50%

Digital Transition
Stakeholder's Voting Results

	1 - A European framework for common tourism data standards and language exists	2 - A European shared tourism data space ensures a flow of data across shared data network	3 - A digital European tourism market place exists for all tourism offers	4 - Tourism experiences are available digital and virtual to be consumed before, during and after travel	5 - European is an integrated smart tourism destination	6 - A clear regulatory framework for European tourism sharing economy platforms exists	7 - Digital destination innovation hubs are established on regional destination level	8 - Tourism SMEs and the tourism workforce are digitally empowered and equipped
FEASIBILITY AVERAGE								
1.How feasible is the target for 2030? (5 - Very much feasible, 1 - Not at all feasible)	3.8	3.5	3.7	2.6	3.6	3.6	3.9	3.6
2.How feasible is the milestone for 2025? (5 - Very much feasible, 1 - Not at all feasible)	3.6	3.4	3.5	2.6	3.3	3.5	4.1	3.5
3.How feasible is the milestone for 2022? (5 - Very much feasible, 1 - Not at all feasible)	3.1	2.8	3.3	2.6	2.9	3.1	3.4	3.2
4.How feasible is it for your organisation to implement the actions suggested? (5 - Very much feasible, 1 - Not at all feasible)	2.9	3.1	3.3	2.8	3.5	3.6	3.8	3.5
FUTURE WORK (%) 5.Are you going to increase your work on this topic between 2022 and 2025?								
1 – No, we do not plan to increase our work on this topic	29%	0%	0%	12%	0%	0%	0%	23%
2 – We aim to increase work on this topic but do not yet have an approved plan	14%	42%	33%	29%	27%	14%	17%	23%

	1 - A European framework for common tourism data standards and language exists	2 - A European shared tourism data space ensures a flow of data across shared data network	3 - A digital European tourism market place exists for all tourism offers	4 - Tourism experiences are available digital and virtual to be consumed before, during and after travel	5 - European is an integrated smart tourism destination	6 - A clear regulatory framework for European tourism sharing economy platforms exists	7 - Digital destination innovation hubs are established on regional destination level	8 - Tourism SMEs and the tourism workforce are digitally empowered and equipped
3 – We will increase work on this topic as per our approved plan/strategy, following our targets already set	14%	17%	17%	35%	36%	43%	42%	15%
4 – It is possible to revise our plan/strategy to meet the targets set in the EC transition pathway	21%	25%	33%	6%	0%	14%	17%	15%
5 – Our plans are already aligned with the targets set in the EC transition pathway	21%	17%	17%	18%	36%	29%	25%	23%
COSTS/BENEFITS (%) — 6. Do you think the costs/investments needed from your organisation to implement these actions will be compensated with respective benefits?								
1 – Not compensated with respective benefits even in the long term	7%	8%	0%	18%	0%	0%	0%	0%
2 – Only partially compensated	7%	8%	0%	12%	0%	0%	0%	23%
3 – Not sure if compensated	50%	33%	33%	41%	55%	36%	25%	38%
4 – Mostly compensated	14%	17%	42%	12%	27%	36%	33%	15%
5 – Fully compensated with long-term benefits	21%	33%	25%	18%	18%	29%	42%	23%

Resilient Transition
Stakeholder's Voting Results

	1 - DMOs have become collaborative in novation organisations	2 - Tourism has positive social impact on visited communities	3 - Tourism services and facilities accessible to all	4 - Peer learning database of best-practices and l earning experiences	5 - Tourism industry business models support residents and visitors alike	6 - Tourism has adaptive capacity to cope with impacts of climate change	7 - Training and upskilling/res killing options available for tourism workers	8 - Tourism allows for positive career paths and good working conditions
FEASIBILITY AVERAGE								
1.How feasible is the target for 2030? (5 - Very much feasible, 1 - Not at all feasible)	3.6	3.8	2.9	4	4.4	2.9	3.9	3.5
2.How feasible is the milestone for 2025? (5 - Very much feasible, 1 - Not at all feasible)	3.4	3.6	2.9	3.6	4.2	3.2	3.8	3.7
3.How feasible is the milestone for 2022? (5 - Very much feasible, 1 - Not at all feasible)	3.2	3.4	3.2	3.5	3.6	2.9	3.5	3.2
4.How feasible is it for your organisation to implement the actions suggested? (5 - Very much feasible, 1 - Not at all feasible)	3.3	3.5	3.2	3.4	4.0	3.3	3.5	3.3
FUTURE WORK (%)								
5.Are you going to increase your work on this topic between 2022 and 2025?								
1 – No, we do not plan to increase our work on this topic	17%	9%	0%	7%	0%	0%	0%	25%
2 – We aim to increase work on this topic but do not yet have an approved plan	0%	18%	29%	14%	15%	33%	38%	0%
3 – We will increase work on this topic as per our approved plan/strategy, following our targets already set	42%	36%	43%	36%	23%	33%	23%	8%

Resilient Transition
Stakeholder's Voting Results

	1 - DMOs have become collaborative innovation organisations	2 - Tourism has positive social impact on visited communities	3 - Tourism services and facilities accessible to all	4 - Peer learning database of best-practices and learning experiences	5 - Tourism industry business models support residents and visitors alike	6 - Tourism has adaptive capacity to cope with impacts of climate change	7 - Training and upskilling/reskilling options available for tourism workers	8 - Tourism allows for positive career paths and good working conditions
4 – It is possible to revise our plan/strategy to meet the targets set in the EC transition pathway	17%	27%	7%	36%	38%	13%	31%	25%
5 - Our plans are already aligned with the targets set in the EC transition pathway	25%	9%	21%	7%	23%	20%	8%	42%
COSTS/BENEFITS (%) 6.Do you think the costs/investments needed from your organisation to implement these actions will be compensated with respective benefits?								
1 – Not compensated with respective benefits even in the long term	8%	9%	7%	7%	8%	13%	8%	8%
2 – Only partially compensated	17%	27%	29%	0%	0%	0%	15%	0%
3 – Not sure if compensated	25%	18%	43%	50%	31%	60%	38%	25%
4 – Mostly compensated	25%	27%	14%	43%	38%	20%	15%	42%
5 – Fully compensated with long-term benefits	25%	18%	7%	0%	23%	7%	23%	25%