



Transition pathway for tourism: Taking stock of progress by 2023



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Executive summary

In 2021, the European tourism industry was still reeling from the effects of the COVID-19 pandemic. Against that backdrop, the 2021 update of the [EU's Industrial Strategy](#) stressed the importance of supporting the recovery of the tourism ecosystem, while also making the most of the opportunity to accelerate the green and digital transitions. It was in this context that the transition pathway for tourism was launched.

The [transition pathway for tourism](#) was developed through an 8-month-long [co-creation](#) process in 2021 and [published in February 2022](#). It recognised 27 areas of action to help the European tourism community to:

- successfully recover from the pandemic while meeting the changing demand of technically savvy and increasingly environmentally and socially conscious consumers;
- effectively contribute to the ambitious EU Green Deal and Digital Decade objectives; and
- build long-term resilience.

Two years later, this first stock-taking exercise shows that the transition pathway co-creation process was successful in identifying key areas for action and defining relevant objectives to inspire different groups of stakeholders to take action. While this report identifies some suggestions for improvement, the overall approach has proven successful in supporting the collective work towards achieving the transition of the EU tourism ecosystem and building its resilience.

Since February 2022, DG GROW has been collecting stakeholder pledges to support the transition pathway topic areas through concrete actions and measurable targets. By October 2023, there were [424 published pledges](#) covering all topics identified in the transition pathway. Published commitments to supporting the pathway's objectives were collected from [204 organisations across 34 EU and non-EU countries](#).

The Council adopted in December 2022 the [EU Agenda for Tourism 2030](#) as Council conclusions with a concrete workplan. This demonstrated the support of the Member States to the work areas recognised through the stakeholder co-creation process. Other EU institutions, such as the European Parliament (TRAN committee, Tourism Task Force), the Committee of the Regions, and the European Economic and Social Committee have also been actively engaged in exchanges of views and the follow-up of the transition pathway. In addition to the EU funds across several funding programmes summarised in [Guide on EU funding for tourism](#), budgetary support from the European Parliament has contributed in 2022-2023 to establishing actions that address several transition pathway areas.

Among the 27 areas, actions relating to **policy and governance** show the greatest progress across the five main dimensions of the transition pathway, especially for topics on improving indicators and measurements for tourism and developing comprehensive tourism strategies. A significant share of Member States actors and stakeholders across the EU and types of

organisations are involved, with public organisations playing a key role. A total of 19 Member States have already put in place strategies that consider the economic, environmental and social sustainability of tourism and many have developed or are in the process of developing data collection mechanisms to monitor these aspects. NGOs and SMEs play an active role by collaborating with public authorities on strategy development and follow-up, supported by EU legislative action such as the actions on short-term rentals and multimodal passenger mobility.

The **green transition** is spearheaded by the action topic on supporting transition measures for tourism companies. This topic achieved the highest number of all pledges (45), and the highest number of results reported. The pledges demonstrate that the transition pathway has managed to increase attention on, and monitoring of, the environmental impact of tourism, with several actors setting concrete targets to reduce the environmental impact of their tourism services. Furthermore, the analysis of both pledges and start-ups shows that there is increasing business innovation in the offer of tourism activities, valorising and increasing the appreciation of natural resources, and reducing resource use through sharing approaches or with technological solutions. Proposed change indicators include the number of tourists using the train, and the number of tourist accommodation establishments certified with a third-party-verified environmental management scheme or ecological label.

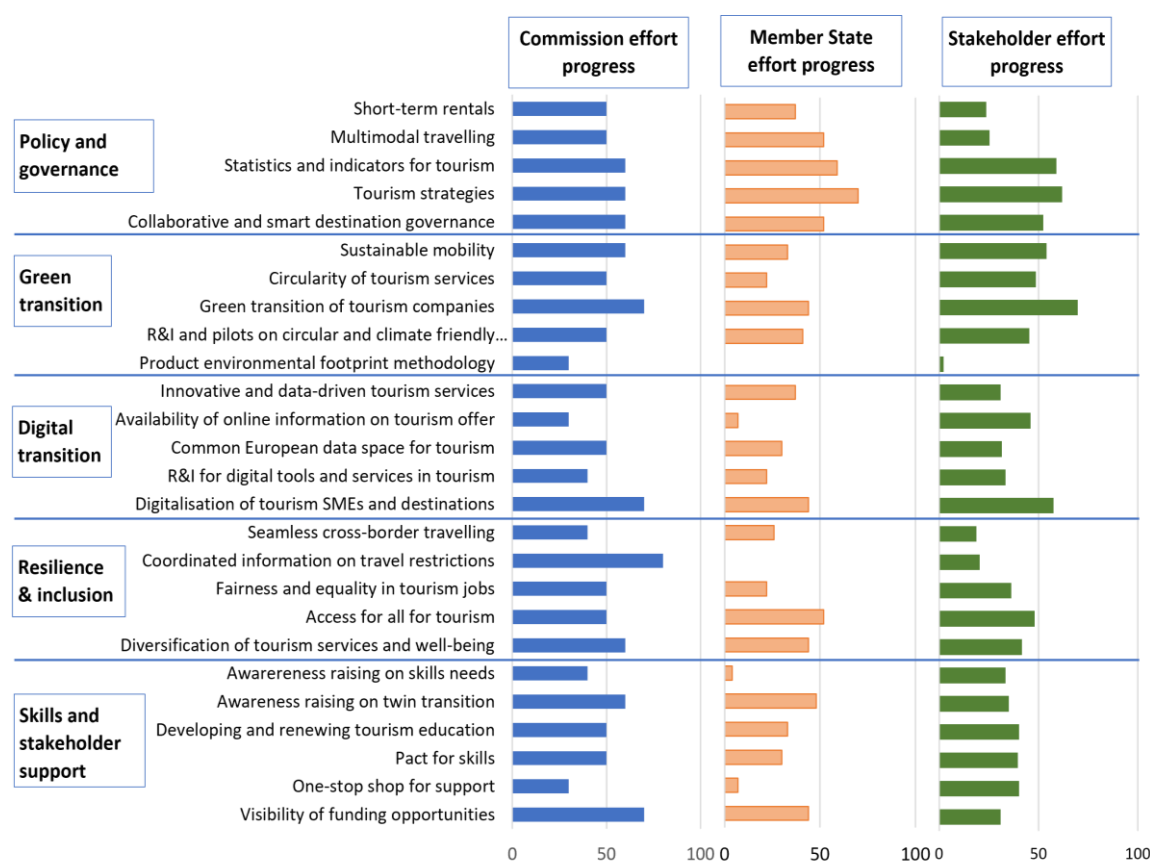
The **digital transition** dimension is slightly behind the green transition in terms of stakeholder pledges and reported Member States measures. While the Commission and Member States have devoted significant effort to enhancing data sharing policies, stakeholders' efforts address first and foremost issues relating to tourism companies' daily tasks, such as increasing the use of digital tools to improve and ease tourism service provision, management and marketing. Nevertheless, many start-ups and pledges show that advanced digital developments are already taking place, and 31.2% of SMEs surveyed for the [European Monitor of Industrial Ecosystems \(EMI\) project](#) have taken up advanced technologies (cloud, AI, big data). Proposed change indicators include the level of basic digital intensity of SMEs as well as the availability of tourism-relevant datasets to support tourism innovation and monitoring.

Resilience and inclusion actions have progressed, but with less participation across different groups, even though Member States and stakeholders recognised these issues' importance. Many of the actions under this area were formulated to be implemented by policymakers and public authorities, which may have not sufficiently encouraged stakeholders' participation. However, innovative companies are making a contribution, developing tools, platforms and approaches to support specific types of tourism and to help tourists to travel to and enjoy hidden gems at different tourism destinations, thus also achieving greater tourism dispersion. Public authorities especially support developments towards better accessibility in tourism. One important indicator to be followed is tourism intensity as the ratio of overnight visitors to residents. This indicator should be explored at regional levels to observe the differences that would not be visible by viewing national or EU averages only.

The last dimension - **skills and stakeholder support** - is a key enabler for the green and digital transitions as well as for building resilience. Awareness raising on the needs and opportunities of the transition is a key first step, one that is supported both by the Member

States and NGOs. Stakeholders are actively developing approaches for formal education and training for reskilling and upskilling existing employees and job seekers, and are also benefiting from the EU-funded Erasmus+ programme. However, this area requires more engagement across all Member States to develop local and regional skills-building mechanisms that meet the needs of future tourism jobs. While [56 500 people benefitted from upskilling and reskilling in 2022](#), this number must double to reach the [Pact for Skills](#) target of training 10% of the tourism workforce annually. This is one of the change indicators to be followed, together with the number of tourism-related national and regional skills partnerships.

This first stock-taking report establishes **a mechanism for regular progress assessment**. This involves a quantifiable formula to evaluate effort and progress for each transition pathway topic for the three key groups of actors: The European Commission, Member States and tourism stakeholders. While some of the transition pathway topics may have differing degrees of relevance for different groups of actors, this approach makes it possible to have a systematic overview across the 27 transition pathway topics and provides a basis for comparison in the coming years. The figure below summarises the effort and progress across the transition topics and actor groups.



Overall, by October 2023 the [published pledges and commitments](#) demonstrate engagement of stakeholders from 24 Member States, together with 10 other countries (Albania, Bosnia and Herzegovia, Japan, Liechtenstein, Montenegro, North Macedonia, Norway, the UK, Switzerland, and the USA). Already 128 organisations across 23 Member States have presented concrete action pledges, while 76 organisations submitted their commitment at a more general level. There is a need for greater awareness of this inclusive call for action, and

for wider support for the design of meaningful actions and targets. In this context, the Member States can play an important role in improving awareness and calling for action in their regions. Actors from all Member States should be brought on board, with peer support within their country and across borders.

The largest share of stakeholder pledges (10.6%) concern the green transition of tourism SMEs, which is also the area with largest share of pledges reporting shareable results. The next most common topics for pledges are the development of tourism strategies (8%) and improving statistics and indicators for tourism (7.5%). Already 36% of pledges report having results that can be shared, and 8% reported being fully completed. SMEs and business associations are the most active organisations, representing 29% of all pledges.

The stakeholder pledges and reported Member States best practices have also highlighted actions which cut across the 27 actions of the transition pathway, such as climate change, importance of cultural tourism and well-being of local communities. This confirms that the transition pathway list of topics is not seen as a restrictive framework but rather as an invitation to act and think about the future of tourism. At the same time, discussions with stakeholders have brought up areas with potential for inclusion in the strategic objectives in the future. Such areas include considering and supporting the responsible traveller's perspective, making use of behavioural sciences, cultivating the potential of social economy for tourism, and taking a regenerative approach – designing tourism in such a way that it becomes a source for positive development for the environment and local communities.

Sharing concrete actions with clear targets should be seen as a collaborative creation, learning and transformation process. The main essence of the transition pathway resides in the individual actions taking place and building the collective impact. Therefore, significant effort should be made to help each stakeholder to define and share meaningful actions, and find inspiring examples relevant for them. This is a key task for the [Together for EU Tourism \(T4T\) expert group](#) established in 2023 with thematic subgroups. Their work will be supported by the upcoming online T4T transition pathways stakeholder support platform, which is under development since 2023. Together these measures should accelerate the EU's tourism transition by presenting examples that are inspiring, useful and implementable for all types of tourism actors across the EU – and by helping actors become aware of them.

Regular updating of the stock-taking indicators will contribute to building knowledge for the first 3-yearly reporting after 2025 to the Council of the European Union on the progress of the EU Agenda for Tourism 2030. That will be the moment to assess how to update the objectives and action areas of the transition pathway and EU Agenda in order to effectively advance towards a competitive, responsible and resilient EU tourism that ensures the well-being of residents and visitors and makes progress towards climate neutrality by 2050.

A key conclusion from this first stock-taking exercise is that all work areas are progressing, and should continue to be supported. In 2024, work continues in all 27 transition pathway action topic areas and dedicated focus should be given to:

Improving available data and measurements that can be compared and shared to support economically, environmentally and socially sustainable tourism management, development and monitoring. [The EU Competence Centre for data management \(D3HUB\)](#) in tourism destinations and the [EU Tourism Dashboard](#) will play key roles

to support this in the EU, considering international developments and working together with best practice sharing across Member States and the work of the T4T expert subgroups. This work should also contribute to assessing options for revising the Regulation (EU)692/2011 on EU tourism statistics.

Accelerating the digital transition in all its aspects: skills, basic and advanced technology adoption and facilitation of data sharing. This is supported especially by [EU digital innovation hubs](#), the [Enterprise Europe Network](#) and the data sharing test case developed as a follow-up of the [Communication on Common European Data Space for Tourism](#). Member States support is key for the digital transition and could provide key support to the data space governance through establishing a [European Digital Infrastructure Consortium](#) (EDIC) as a multi-country project.

Building destinations' resilience by placing the well-being of local residents at the core of developments and monitoring, also considering the quality of tourism jobs and access for all for tourism. Sharing [best practices of award-winning cities](#) and lessons learned from Commission study on [developing crisis management capacity and governance of destinations](#) across the EU will contribute to this goal.

Investing in reskilling and upskilling the tourism workforce and building new skills for sustainable and responsible innovation in tourism benefitting from digital technologies and providing enriching tourism experiences both for visitors and residents. The [EU Pact for Skills large-scale partnership for tourism](#) and [Erasmus+ funding for cooperation partnerships](#) provide key support for this while mobilising stakeholders at local and regional levels is essential.

Accelerating synergies between actors with shared interests and experience and match-making organisations with relevant knowledge. The [T4T stakeholder expert group](#) and upcoming T4T online stakeholder support platform will play a key role in these tasks, supported by the Commission [project launched to develop best practice exchange and a twinning mechanism](#) between destinations. Better information sharing on ongoing tourism-related projects funded across EU and national programmes will contribute to this.

List of acronyms

AI	Artificial intelligence
DG GROW	DG Internal Market Industry, Entrepreneurship and SMEs
DMO	Destination marketing/management organisation
EC	European Commission
EDIC	European digital infrastructure consortium
EDIH	EU digital innovation hub
EEN	Enterprise Europe Network
EU	European Union
EU DCC	EU Digital COVID-19 Certificate
NAP	National access point
NGO	Non-governmental organisation
PEF	Product environmental footprint
PEFCR	Product environmental footprint category rules
PTD	Passenger Travel Directive
R&I	Research and innovation
SMEs	Small and medium-sized enterprises
SMP	Single market programme
STR	Short-term rentals
SUMP	Sustainable urban mobility plan
T4T	‘Together for EU Tourism’ community – with related T4T informal Commission expert group and T4T online stakeholder support platform
TAC	Tourism Advisory Committee
TTP	Transition pathway for tourism (Tourism transition pathway)
UNWTO	World Tourism Organisation a United Nations specialized agency
VR	Virtual reality

1. Introduction

1.1. Context in which the transition pathway was launched

On 10 March 2020, the Commission adopted a [new Industrial Strategy](#), highlighting the need to focus on industrial ecosystems taking into account all actors within a value chain instead of focusing on separate economic sectors. The aim was to help EU industry lead the green and digital transitions and to boost the EU's global competitiveness and open strategic autonomy. In light of the experience of the COVID-19 pandemic, the [update of the EU Industrial Strategy in 2021](#) emphasised the need to further accelerate the green and digital transitions and increase the resilience of the EU's industrial ecosystems. To do so, the Commission proposed launching transition pathways to be co-created with stakeholders. As the tourism ecosystem was the most seriously affected by the pandemic and faces major challenges to achieve the green and digital transitions, it was identified as a priority and the first industrial ecosystem to start working on its transition pathway.

As demonstrated in Table 1, tourism is a complex and diversified ecosystem composed of several economic sectors. In 2022, it included over 3,2 million companies, of which 92% were microenterprises ⁽¹⁾. The political competence in the area lies mainly with national and/or regional and local authorities. Therefore, to develop a transition pathway for the ecosystem, it was important to reach out and engage public and private stakeholders across sectors and across the EU to actively participate in the transition pathway as a continuous and collaborative process.

Table 1: Tourism ecosystem key sectors

NACE (rev.2)	Description	% of sector
H49	Land transport and transport via pipeline	45
H50	Water transport	22
H51	Air transport	91
I	Accommodation and food service activities	100
N79	Travel agency, tour operator and other reservation service and related activities	100
N82	Office administrative, office support and other business support activities	100
R90-R92	Creative, arts and entertainment activities; libraries, archives, museums and other cultural activities; gambling and betting activities	66
R93	Sports activities and amusement and recreation activities	100

(1) [SME performance review Annual Report 2022/2023](#)

1.2. Recovery and current progress of EU tourism

The latest [Tourism Satellite Accounts \(TSA\) data](#) indicate that the EU tourism ecosystem suffered significantly from the COVID-19 pandemic, even [losing EUR 500 million of gross value added daily in 2020 when compared to 2019](#).

During the COVID-19, the tourism ecosystem lost workforce, dropping from 20.7 million people employed in 2019 to 18.9 million employed in 2021 (estimate from the [Annual Single Market Report](#) and internal DG GROW estimate respectively). In some sectors, recovery has been faster: recent [quarterly data on specific sectors](#) shows that recovery has been achieved in the accommodation and food services sector, which employed approximately 10.0 million people in Q3/2023, similar to Q3/2019. However, the recovery is continuing in the air transport and travel agency sectors, which in Q3/2023 were still below Q3/2019 employment figures.

Eurostat data shows that the nights spent at EU tourist accommodation reached a record of [1.2 billion nights in the first half of 2023, exceeding 2019 values](#). Nights by domestic guests exceeded the pre-pandemic level while the figure for foreign guests was down 2% from 2019 levels. After plummeting to the bottom in 2019, the [business confidence indicator](#) for the tourism ecosystem recovered back to the top 3 of the 14 ecosystems, and has remained there since September 2022 until November 2023 (latest indicator available when publishing this report).

However, the recovery remains fragile, as tourism in Member States is suffering from the effects of Russia's invasion of Ukraine, inflation and extreme weather. The transition pathway remains relevant in all its aspects. It continues contributing to a more strategic, competitive and resilient development of EU tourism, which takes into account changes in tourism demand, the need to respect natural resources, and the innovative potential of digital developments, while safeguarding the long-term well-being of local communities as key actors for ensuring attractive tourism destinations and sustainable experiences.

1.3. Implementation elements of the transition pathway

Figure 1 shows how the transition pathway for tourism development began with the publication of a [staff working document](#) outlining transition scenarios and opening an 8-month-long co-creation process with stakeholders. The co-creation culminated in the published [transition pathway for tourism policy report](#) in February 2022. In December 2022, the Council adopted the [EU Agenda for Tourism 2030](#), which confirmed the strategic importance of the areas of actions identified by stakeholders.

To encourage stakeholders to put theory into action, the Commission launched a call for commitments from stakeholders in February 2022; since then it has regularly published a continuously expanding set of stakeholder pledges for action. By October 2023, there were 424 pledges from public and private stakeholders, and actors from 34 countries had expressed their commitment to the EU transition pathway for tourism.

To support the governance and implementation of the transition pathway, and the ‘Together for EU Tourism’ (T4T) community that includes all public and private actors contributing to common goals, the Commission set up an [informal Commission expert group](#), with three subgroups to follow up the green transition, digital transition and resilience (including skills and inclusion). An online stakeholder support platform will facilitate access to resources, information, and collaborations from 2024 onwards.

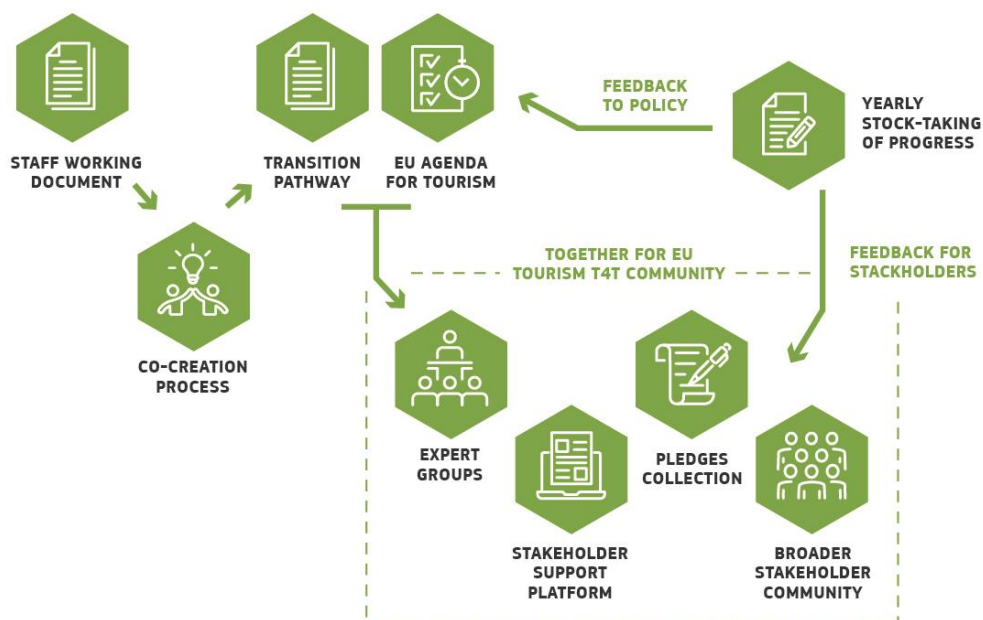


Figure 1: Elements of the transition pathway collaborative approach

All these elements and actors of the T4T community contribute to the regular evaluation and stock-taking of the transition pathway and EU Agenda, which then provides feedback both for the stakeholders themselves and for tourism policy developments.

1.4. Link with the EU Agenda for Tourism 2030

On 1 December 2022, the Council of the European Union adopted the [European Agenda for Tourism 2030](#) as a strategic compass for the European tourism policy by the Member States. For the first time, this Agenda includes a concrete workplan, which supports action areas recognised by the tourism stakeholders during the co-creation of the transition pathway. [Figure 2](#) maps the areas of this workplan against the topics of the transition pathway for tourism. As these policy documents are well aligned, the collaborative follow-up of the transition pathway also feeds into the progress assessment of the EU Agenda 2030.

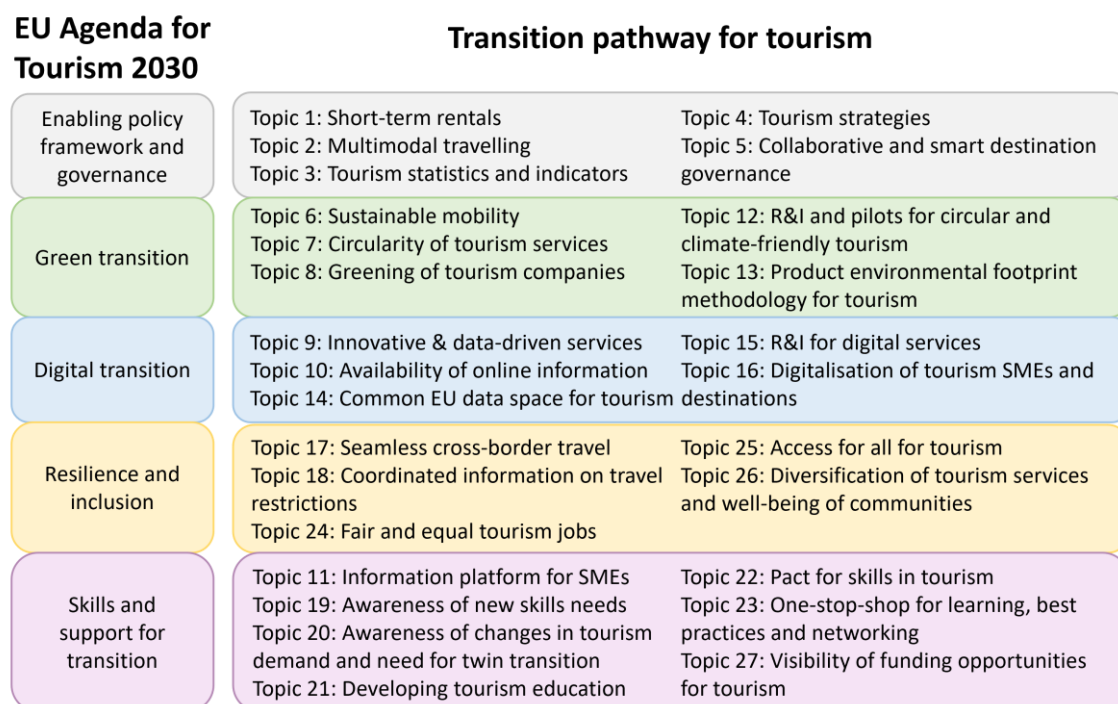


Figure 2: Interlinkages between EU Agenda and Transition Pathway

1.5. Stock-taking approach and sources

The planned approach for taking stock of the progress on the transition pathway builds on a variety of sources and inputs, which include:

- pledge content analysis manually and through text/data mining;
- self-reported pledge progress updates by stakeholders (annual data collection through structured form);
- Member States' annual reports to the Tourism Advisory Committee (TAC);
- data from the EU Tourism Dashboard, Eurostat statistics, other statistical sources;
- stakeholder consultations and information collection from:
 - [Tourism Advisory Committee](#);
 - Commission informal expert group '[Together for EU Tourism](#)';
 - [Industrial Forum Task Force 2](#);
 - Commission inter-service consultation;
- [European Monitor of Industrial Ecosystems \(EMI\) project](#) – [EMI tourism report](#);
- DG GROW desk research.

The [Transition pathway for tourism](#) report described the background of the actions and state-of-the-art by end of 2021. The current stock-taking report focuses on actions and achievements between then and the end of 2023. The earlier policy background regarding different action areas is not repeated in this report.

1.6. Objective of this report

This report aims to serve three types of audiences, who may read the document in different ways:

- readers interested in a quick overview of the transition pathway for tourism's progress (focusing on the executive summary and Annex II);
- readers looking for information on progress and examples relating to specific transition pathway for tourism topics (selecting topic-specific sections);
- readers searching for an in-depth updated understanding of the broad scope of transition in the EU tourism landscape (reading the whole report).

This report also aims to establish a basis for evaluating the tourism transition pathway's progress in a systematic manner, considering all the key elements of action recognised by the stakeholders. The established model can be used for evaluating progress in a comparable manner between years and it builds evidence for the three-yearly reporting to the Council on the EU Agenda for Tourism 2030. It also provides a potentially replicable model for other industrial ecosystems' transition pathways to take stock of their progress.

The next chapter of the report provides a short progress assessment with illustrative examples for each of the transition pathway topics, grouped under the five groups of action used in the EU Agenda for Tourism 2030: policy and governance; green transition; digital transition; resilience and inclusion; skills and support for transition. The third chapter summarises the stakeholder engagement and fourth chapter lists issues that extend and complement the scope of the current transition pathway work topics. Annexes provide summary information on transition pathway topics (Annex I), progress assessment across topics (Annex II), proposed change indicators to be followed starting from a 2022 baseline (Annex III) and a reading guide for the EU Tourism Dashboard graphical index (Annex IV).

2. Progress by transition pathway topics

This report assesses progress on each of the transition pathway ‘action topics’ based on the outputs expected, engagement of actors through pledges and reporting, and other possible achievements contributing to these areas of action. The approach follows the 27 action topics as defined in the transition pathway, which are also linked to the workplan of the EU Agenda 2030. In some cases, issues under different topics are grouped together if they link closely to each other.

Based on the information collected, the report proposes for every action area quantitative effort progress values for each key group of actors, calculated with the following formula:

Table 2 – Topic-based effort progress evaluation for key actor groups

Key groups	Effort progress calculation formula	Min	Max
European Commission	A qualitative estimation that produces a numerical value that reflects the completion rate by the European Commission with respect to the outputs outlined in the transition pathway report Annex I. This estimation is done by considering the reported results summarised for the topic, originally expected outputs and still remaining work. For example, if originally expected outputs were legislative measures and they have been adopted by end of 2023, Commission work still remains in supporting implementation of the legislation, monitoring and enforcing it. Therefore, legislative action completion would be considered as 50% and implemented support initiatives would add to the estimated effort value.	0	100
Member States	Share of Member States taking measures based on reporting through TAC or with submitted pledges	0	100
Stakeholders	<u>Pledge ratio</u> : (Number of pledges in topic / average number of pledges per topic) / (maximum value for number of pledges / average)	0	100
	<u>Pledger diversity</u> : (Share of pledge origin Member States [x/27] + Share of pledge origin organisation types [x/14]) / 2	0	100
	<u>Pledge results</u> : Share of pledges with progress reported as “fully completed” or “in progress with sharable results”	0	100
	Stakeholder action total: (ratio + diversity + results)/3	0	100

Because some action topics were initially targeted for specific actor groups, it is unlikely that all groups of actors will become equally engaged in their implementation. However, the collaborative approach to implementing the transition pathway has demonstrated that all types of actors can find ways to contribute to all topics. This is acknowledged by following all groups’ contributions in a systematic manner that can be compared across the years. Annex II provides an overview of the analysis built on this basis across all transition pathway topics and all groups of actors.

While the ‘progress on transition pathway topics’ assesses progress towards expected outputs outlined during the co-creation process, it is important also to follow overall changes in the tourism ecosystem. Therefore, the report also proposes a ‘change indicator’ for each topic,

based on data or statistics available on a specific element linking to the expected area or work. Annex III provides a list of these change indicators for all transition topics.

2.1. Policy and governance

In accordance with the [Treaty of the Functioning of the European Union](#) (TFEU), the EU's competence on tourism (Article 195 of TFEU) is to complement the actions of Member States. To that end, EU-level action is aimed at encouraging the creation of a favourable environment for the undertakings of the sector, and promoting cooperation between Member States, particularly through the exchange of good practice.

This means that the key decision-making levels for developing tourism in the EU are the Member States, regional and local authorities, based on their regulatory structures. However, there are several areas where EU-level policy impacts the tourism ecosystem:

- [Environmental policies](#): [European Green Deal](#) (including [circular economy](#), [biodiversity strategy](#)), [Fit for 55](#) (including energy efficiency, the Emissions Trading Systems's impact on transport prices, alternative fuel infrastructures), [EU water policy](#), [blue economy](#);
- [Mobility policies](#): [sustainable and smart mobility strategy](#), air, rail, road and maritime passenger transport, multimodal digital ticketing, urban mobility, transport infrastructure and investment policies;
- [Digital policies](#): [Digital decade](#), [online platforms](#), [digitalisation of industry](#);
- [Consumer protection](#) and passenger mobility policies: [Passenger rights](#) Regulations, [Package Travel](#) Directive;
- Data and statistics policies: [European strategy for data](#), data collection and sharing on short-term rentals, [Regulation on tourism statistics](#));
- [Cohesion policy and territorial cooperation](#): (including urban, cross-border, rural and remote areas and outermost regions), [EU long term vision for rural areas](#);
- Travel facilitation related policies: [visa policy](#), [rules for travelling in the EU](#);
- [Employment, social and inclusion policies](#): [skills and qualifications](#), [rights for people with disabilities](#), [working rights](#);
- [Taxation and customs policies](#);
- [Educational policies and programmes](#), [Cultural policies and cultural heritage](#);
- [Industrial strategy](#): supporting tourism as one of the key 14 EU industrial ecosystems, with follow-up through the annual single market report, [annual SME performance review](#) and support under the [Single Market Programme](#) and the [SME relief package](#).

A key milestone for the policy progress of the transition pathway for tourism is the support it has received from the EU Member States. The Council conclusions on the [EU Agenda for](#)

[Tourism](#) strengthen and provide visibility to the collaborative spirit with which EU tourism stakeholders are working together to transform EU tourism. It is a key advancement in the tourism policy area where the legal competences lie mostly with national, regional and local authorities, and their commitment is crucial.

The report sections focusing on the green transition (2.2), digital transition (2.3), resilience (2.4) and skills development (2.5) cover the recent developments of related EU policies. The current section covers the follow-up of policy developments highlighted in the stakeholder consultation as key elements to the overall governance of tourism: short-term rentals, multimodal digital ticketing and tourism statistics.

2.1.1. Short-term rentals

Topic 1 related actions in transition pathway and EU Agenda 2030	
Transition pathway: Actions	Expected outputs
<p>Strengthening the EU framework for short-term rentals to enhance transparency and improve market access</p> <p>Implementing STR policies which support balanced, fair, and transparent short-term rental services</p>	<p>A well-flourishing and transparent STR market in the EU, creating opportunities and contributing to tourism ecosystem in a fully sustainable manner</p>
EU Agenda 2030: Actions	Expected outputs
<p>Member States and the Commission to strengthen the EU framework for short-term rentals to enhance transparency, make it fairer and improve market access</p> <p>Member States to support regional and local authorities</p>	<p>EU-level common framework for short-term [rentals]</p>

Short-term accommodation rentals (STRs) were the first form of accommodation to recover from COVID-19, by [already exceeding in 2022 the 2019 levels for nights spent](#). In 2022, they [represented over 549 million nights booked](#) while traditional accommodation statistics accounted for 2750 million nights (which also can include STR accommodation providers with over 10 bed places). The need of local authorities to have tools to monitor and regulate platform-based short-term rentals has grown alongside the intensifying discussions about overtourism in city centres.

Commission action: On 16 November 2023, a [political agreement](#) was found based on the [Commission proposal for a Regulation on short-term rentals \(presented in November 2022\)](#). The new rules are expected to come into application in early 2026. The Regulation makes it possible for Member States or regions to 'opt in' to its implementation and request that platforms share data on short-term rental units in their territory regarding nights rented, number of guests hosted, registration number and URL listings via a national single digital entry point. The Commission has launched work on developing a technical prototype in collaboration with Member States for the technical implementation of data sharing on STRs.

Member State example: Estonia

Estonia sees the need to synchronize and harmonize rules of short-term rentals at the EU level. We will participate in process of common development and implementation of common principles, however bearing in mind that regions are different and may need different approach.

Member States action: Based on the reporting collected from Member States through the Tourism Advisory Committee (TAC), short-term rentals are considered a challenge in 9 Member States, while 7 consider it a priority. There are 9 Member States that already have measures in place regarding STRs, and 2 have published [shareable good practices](#) through TAC reporting. One Member State (Estonia) has also made a pledge to use the EU-level regulation as a guideline for national strategies and action plans in relation to STRs.

Stakeholder action: Key figures for transition pathway topic 1 pledges:



Stakeholder action is dependent on operating context and objectives; such actions include:

- a trade union committing to supporting the EU legislative procedure by sharing information from and with member organisations on short-term rentals;
- business associations committing to developing guidelines on sustainable business for short-term rentals;
- an SME committing to providing a platform which features only quality and trustworthy short-term accommodation offers, while also exploring new opportunities for social and sharing economy models.

Example pledge with reported progress by Sphere Travel Club

“Sphere Travel Club contributes to a flourishing and transparent STR market by transparently controlling the quality and offer on its platform, opening up the market for exchange among holiday homeowners. We pledge to curate a collection of properties that have outstanding quality, only correct information, and owners of trust, so as to ensure that clients receive what they are offered and to avoid any type of fraud through a trustful environment. Our target for 2025 is to have at least 15 properties in each member state of the EU.

Furthermore, many holiday properties stand empty up to 80% of the year and are only sparsely used by their owners, thereby representing a considerable environmental impact. One of our core aims is to provide a community of trust that allows more people to access unused holiday home properties through the sharing economy, thereby optimising the existing resources and positively contributing to the environment. Our target for 2025 is to have saved 10 000 weeks from going to waste.”

Progress indicators for topic 1 by 2023 based on reported efforts	Change indicator: Number of Member States having established a single digital entry point for platforms to deliver data on short-term rentals							
<table border="1"> <tr> <td>Stakeholders</td> <td>24%</td> </tr> <tr> <td>Member States</td> <td>37%</td> </tr> <tr> <td>European Commission</td> <td>50%</td> </tr> </table>	Stakeholders	24%	Member States	37%	European Commission	50%	Base value in 2022	n/a, but 9 Member States with existing measures at national level
	Stakeholders	24%						
	Member States	37%						
European Commission	50%							
Expected for 2025	All Member States where STR share of all accommodation nights is greater than 10%							
Source	TAC reporting							

2.1.2. Multimodal travelling

Topic 2 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Reinforcing the EU framework to facilitate multimodal journey planning and ticketing through digital services.	Increased opportunities for visitors to make door-to-door travel arrangements to both urban and rural EU destinations
EU Agenda 2030 invites Member States to:	
contribute to the green transition of the tourism ecosystem regarding: transport, e.g. by supporting ... the development of multimodal travel	

The possibility to combine different transport options was seen by stakeholders both as key to improving the attractiveness of rural and remote destinations and to the sustainability of travelling. While some platforms and companies provide a possibility to combine airline tickets with bus or train tickets, or inter-urban transport with local transport, there is currently no obligation to facilitate integration of all services into ticketing platforms.

Commission action: The EU-wide [Multimodal Travel Information Services \(MMTIS\) Delegated Regulation](#) includes an obligation to make information on scheduled transport and alternative transport, in all modes, accessible via national access points (NAPs). This obligation applies for data that already exist in digital format for scheduled transport in all modes (urban public transport, rail, air, ferries), as well as alternative modes (such as car sharing, rental pooling), and individual means of transport, such as cycling.

The Commission supports monitoring the accessibility of multimodal data on Member States' national access points (NAP) in the context of the Coordination mechanism project to federate NAPs, [NAPCORE](#). The Commission proposed in November 2023, as part of the [Passenger Mobility Package](#), a revised delegated regulation to extend these obligations to real-time information for all modes of transport, e.g. real-time information on disruption of a train. As part of this package, the Commission has completed a review of the regulatory passenger rights framework and adopted legislative proposals to enforce the existing framework better and to set up rights for passengers combining several collective modes of transport to reach their final destination.

Member State action: Multimodal travelling was not included in the EU Agenda 2030 action plan and therefore was not included in the TAC reporting on implemented measures. [NAPCORE's second report](#) on NAP data availability provides a detailed overview of the different categories of multimodal data accessible through NAPs. It shows that in 2022, 24 Member States had a fully operational NAP to make MMTIS information accessible. Several of them are already making accessible various sets of static and dynamic MMTIS data.

Stakeholder action: key figures for transition pathway topic 2 pledges:

5 Pledges	4 Member States	5 Organisation types	40% Completed / with results
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Stakeholder organisations are supporting multimodality developments and also considering visitor traffic and congestion management under this topic with pledge actions such as:

- a destination management organisation (DMO) offering a smart app which supports visitor experience while helping to deconcentrate visitor flows and guide them towards using public transport;
- a regional administration developing their last-mile mobility offer from railway stations to tourist sites, both for residents and visitors, by launching a call for projects;
- an NGO developing a technical platform solution to support multimodal reservations in a trans-European network (see example box below);
- a trade union committing to organising a meeting with railway and aviation members to discuss best possible intermodal strategies for the transfer of international passengers between transport modes so as to build a well-informed policy position on intermodality;
- a business association organizing training seminars for businesses about concrete solutions and good practices to supply multimodal transport and protocols for the respect and protection of natural heritage and biodiversity.

Example pledge with reported progress by EONA-X

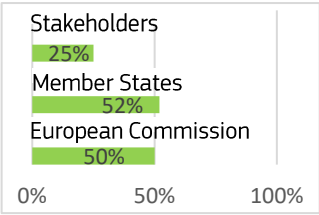
EONA-X is actively working to stimulate the establishment of a trans-European network of intelligent and sustainable transportation. Our services are designed to facilitate multimodal connectivity to tourism points of interest. Furthermore, we aim to help our members offer seamless connection of multimodal travel services through a single reservation.

... [extract of text – see full pledge online] ...

Early 2023: Release of the demonstrator to showcase the vision and capabilities.

Beginning of 2024: Full operational readiness of EONA-X's technical platform.

Mid-2024: Launch of the first use-cases to begin serving the needs of stakeholders and users

Progress indicators for topic 2 by 2023 based on reported efforts	Change indicator: Number of Member States which make both static and dynamic MMTIS data accessible	
 <p>Stakeholders: 25% Member States: 52% European Commission: 50%</p>	Base value in 2022	14 Member States
	Expected for 2025	20 Member States (on path towards all 27 Member States by 2028 following obligation set in Delegated regulation 2017/1926)
	Source	NAPCORE annual reports

2.1.3. Statistics and indicators for tourism

Topic 3 related actions in the transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Revising harmonised data collection rules on tourism statistics to include elements on economic, social and environmental sustainability</p> <p>Improving access to data for producing official statistics</p> <p>Including key sustainability indicators on destination level to the harmonised tourism data collection framework</p> <p>Implementing the EU Tourism Dashboard to support follow-up of environmental, digital and socio-economic aspects of tourism</p>	<p>Revised EU framework for tourism statistics which includes indicators on economic, environmental and social impacts of tourism by 2030</p> <p>Official statistics production benefiting also from privately collected data, in compliance with data protection rules and legitimate commercial interests</p> <p>EU Tourism Dashboard publicly available and used</p>
EU Agenda 2030: Actions	Expected outputs
<p>European Statistical System actors to revise harmonised data collection rules on tourism statistics</p> <p>Tourism industry, regional and local authorities and destination management organisations (DMOs) to consider developing data collection and sharing mechanisms that can also benefit official tourism statistics aggregation</p> <p>The Commission to implement the EU Tourism Dashboard to support the following-up of environmental, digital and socio-economic aspects of tourism</p>	<p>Revised EU framework for tourism statistics which includes indicators on the economic, environmental and social impacts of tourism by 2030.</p> <p>EU Tourism Dashboard publicly offering indicators on the green and digital transition and socio-economic resilience at national, regional and local levels</p>

Commission action: The Commission has facilitated expanding tourism statistics collection across the Member States with [Tourism Satellite Accounts \(TSA\) 2023 edition](#) and with the [Technical support instrument flagship 2022](#) for 7 countries. These prepare ground for potential extensions for the European Statistical System harmonised data collection rules across the Member States. The Commission has made an [agreement with large online collaborative economy platforms](#) to complement official statistics with their data on short-term accommodation rentals. The [EU Tourism Dashboard](#) was developed in consultation with Member States and published in October 2022. The Commission offers on a regular basis capacity building through [European Statistical Training Programme](#), which includes a yearly training course on TSA.

Member States action: Statistics and measurements for tourism are considered a priority in 14 Member States. There are 13 Member States with specific measures in place and 6 have published [shareable good practices](#) through TAC reporting. A total of 7 national actors have made pledges under this topic (Italy, Lithuania,

Member State example: Austria

Within the framework of the 'Plan T – Masterplan for Tourism', new indicators for the performance of the Austrian tourism have been set to evaluate development in all three dimensions of sustainability – economical, ecological and sociocultural.

Data are published in a yearly report on tourism in Austria issued by the Federal Ministry of Labour and Economy. The reports can be found at: <https://www.bmaw.gv.at/Themen/Tourismus/Tourismus-in-Oesterreich/lagebericht.html>

Slovakia, Portugal, Slovenia, Finland, France).

Stakeholder action: key figures for transition pathway topic 3 pledges:

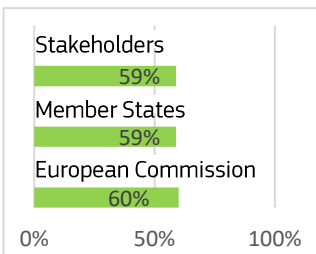
32 pledges	16 Member States	12 organisation types	40% completed / with results
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Stakeholders' pledges are highly complementary and include:

- regional authorities improving collection of sustainable tourism indicators and establishing regional observatories for monitoring tourism;
- DMOs developing indicator sets and data platforms to support monitoring tourism impacts at national and regional levels;
- business associations working with their members, partners and stakeholders to improve data-related knowledge and governance, and to provide concrete options for improving data flows and statistics, also with a view to providing data for official tourism statistics;
- SMEs informing customers with indicators about the environmental impacts of their travel, and assisting destinations in data-based destination management;
- NGOs and international organisations supporting continuous monitoring and development of tourism impact indicators (see example box below).

Example pledge with reported progress by Eurac Research

“Eurac Research is running the Sustainable Tourism Observatory of South Tyrol, being one of the most active observatories of the UNWTO Network INSTO. We are actively contributing to the advancement of Sustainable Tourism Monitoring and Statistics, by identifying new indicators (e.g. using GIS techniques), adequate proxies for missing data (e.g. estimation of resource consumptions) and new monitoring fields (e.g. immaterial heritage preservation). By 2025 we plan to further advance the work of the observatory and to link the political decision-making process to our statistics. Indeed, a regional development plan for South Tyrol (“Landestourismusentwicklungskonzept 2030+) has been approved and officially presented based on the observatory's data (see: <https://news.provinz.bz.it/de/news-archive/664727>). This instrument will transform the tourism system based on the sustainability criteria and will establish maximum capacity limits for the accommodation sector.”

Progress indicators for topic 3 by 2023 based on reported efforts	Change indicator: Participation of Member States in 3-yearly TSA data collection, number of Member States providing at least 32 indicators for tables 1-7	
	Base value in 2022	23 Member States participated, 11 provided at least 32 indicators (out of 42) for tables 1-7
	Expected for 2025	25 Member States participating, 20 providing at least 32 indicators (out of 42) for tables 1-7
	Source	DG GROW desk research, Eurostat TSA reports

2.1.4. Tourism strategies

Topic 4 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Developing comprehensive national or regional strategies taking account of economic, environmental and social sustainability of tourism Guidance and best practice exchange for strategy development on national, regional and local level	All Member States or their key tourism regions to have comprehensive tourism strategies by 2025 Best practice exchange events and resources
EU Agenda 2030: Actions	Expected outputs
The Commission and Member States to facilitate sharing of knowledge and best practices [on tourism strategies].	Best practice exchange [on tourism strategies]

During the preparation of the transition pathway for tourism, stakeholders highlighted the importance of well-designed and data-supported strategies at all appropriate levels (national, regional, local). While this is a competence of Member States or regions (depending on national governance structures), effective sharing of good practice plays a key role.

Commission action: The Commission facilitates best practice exchange and information sharing between Member States authorities in particular through the [TAC](#) and [T4T](#) expert groups. The Commission shares knowledge on Member States' strategies through the annually updated [TAC best practices document](#). The Commission also supports [EU Macro-Regional Strategies](#), and published the [4th report on their implementation](#) in December 2022. All the macro-regional strategies have selected tourism as a priority area and have developed targeted objectives on sustainable tourism.

Member States action: Through TAC reporting (to which 25 Member States responded), 20 Member States indicated that they had national strategies, 11 that they had regional strategies and 7 that they had thematic strategies regarding tourism. Many Member States have more than one type of tourism strategies in place. A total of 19 Member States report covering the economic, environmental and social sustainability of tourism in their strategies, while 10 Member States had updated their strategies in 2022 or more recently. Six national actors have made pledges on developing and following up on tourism strategies: Malta, Estonia, Sweden, Italy, Portugal and France.

Member State examples:

[TAC best practices](#) document contains links to examples of:

Austria	Greece
Bulgaria	Hungary
Croatia	Luxembourg
Czechia	Netherlands
Denmark	Portugal
Estonia	Slovenia
Finland	Spain

Stakeholder action: key figures for transition pathway topic 4 pledges:

34 pledges	14 Member States	12 organisation types	41% completed / with results
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Stakeholders' pledged actions include:

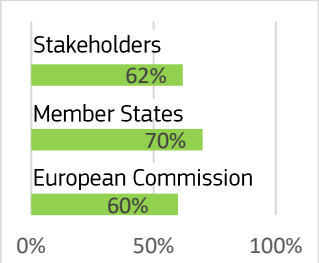
- regional and local administrations building tourism strategies through consultation processes with the public and stakeholders (see example box);
- NGOs collaborating with the responsible authorities to support their development of national, regional and local strategies;
- DMOs continuously developing, updating and transparently monitoring their strategies at national and regional levels;
- SMEs assisting to authorities and destinations by contributing to research and providing concrete digital tools which help define and implement tourism strategies;
- academic institutions providing science-based consultancy for strategy development;
- an international organisation providing yearly updated guidance and recommendations for DMOs to develop and follow their strategies.

Example pledge with reported progress by the Catalan Government

The General Directorate of Tourism of the Catalan Government proposed the Catalan Commitment for Responsible Tourism in March 2023, which is a shared framework agreed with the Catalan tourism ecosystem, having as ultimate goal to contribute to the wellbeing of the community through the values of travel. The Catalan Commitment for Responsible Tourism is a process involving collective participation of related stakeholders (more than 200 amendments were considered) and strong efforts to reconcile very different projects and views with regards to the tourism model of Catalonia. With this commitment, Catalan tourism is embarking on a process of collective transformation to create a new tourism model which is 1) environmentally sustainable; 2) socially just; 3) Territorially balanced; 4) Innovation based. A total of 67 streams for action have been identified falling under these 4 main axes. The Commitment counts nowadays 186 signatories engaged in successfully implementing the Commitment.

Currently the Catalan Government is working on the Catalan Commitment for Responsible Tourism operative plan as well as the visitor's economy marketing plan 2024-2027.

Target 2024: to launch the the Catalan Commitment for Responsible Tourism operative plan as well as the visitor's economy marketing plan 2024-2027.

Progress indicators for topic 4 by 2023 based on reported efforts	Change indicator: Member States reporting on tourism strategies updated 2022 or later which include economic, environmental and social sustainability	
	Base value in 2022	10 Member States
	Expected for 2025	27 Member States
	Source	TAC reporting

2.1.5. Collaborative and smart destination governance

Topic 5 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Establishing collaborative and data-supported destination management models Providing awards for smart destination management (Smart Tourism Capital) Studying and sharing best practice on destination management	All publicly funded destination marketing and management organisations (DMMOs) support collaborative governance which includes public and private stakeholders, residents as well as visitors Results and recommendations of a study on DMMO management models in the EU
EU Agenda 2030: Actions	Expected outputs
The Commission to provide awards for smart and sustainable destination management The Commission and Member States to support destinations in developing their local governance models	Destination awards Study by the Commission on DMO governance models in the EU.

Commission action: The Commission has awarded yearly [Smart Tourism Capitals Awards](#) for large destinations and until 2022 provided EDEN awards for smaller destinations. From 2023, the latter was integrated in the Smart Tourism Capitals Awards and renamed as [EU green pioneer of Smart Tourism](#). These awards invite destinations to improve their management and provide visibility to smart and sustainable destination management relying on collaborative and data-based elements, promoting these destinations and their best practices for others to follow.

The Commission also launched in 2022 a [study on developing crisis management and governance of destinations](#) to improve DMO governance with regard to capacities for potential tourism-related crisis management situations. Another study concluded in 2023 an [EU guide on data for tourism destinations](#).

Member State action: Supporting collaborative destination governance models was considered a priority in 11 Member States, and 13 Member States have put in place measures to support best practice sharing in destination management. In total 8 Member States [shared best practice](#) relating to destination management through TAC reporting. In addition, 3 Member States made pledges on development of collaborative destination governance.

Member State example: Ireland

The Shared Island Initiative Report 2022:

Over 160 people took part online in the Shared Island Dialogue on - Tourism on the shared island: Building on past success to create a sustainable future.

The Dialogue brought together tourism agencies, organisations, interest groups and civil society stakeholders, from North and South, to examine the success of tourism cooperation on the island of Ireland and explore how best to enhance opportunities for domestic and international visitors in the years ahead. Bringing two internationally renowned tourism assets and regions closer together to improve the overall performance of tourism for the island, creating lasting economic opportunity and benefits

<https://www.gov.ie/en/publication/3eb3c-shared-island-dialogues/>

Stakeholder action: key figures for transition pathway topic 5 pledges:

25 pledges	11 Member States	8 organisation types	52% completed / with results
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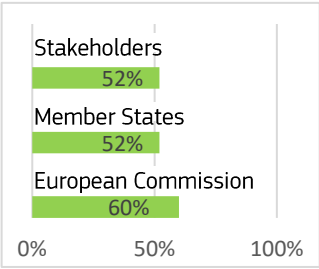
Stakeholders’ pledged actions include:

- regional administrations taking action to establish governance models with regular collaboration with stakeholders and digital platforms which provide support for the monitoring of data and showcasing offer of destinations;
- DMOs at regional level establishing and reporting on implementation of collaborative governance approaches (see example box below), while a national DMO implements destination management guidance for local and regional levels;
- SMEs providing support and consultancy for destinations to develop collaborative governance mechanisms;
- NGOs helping destinations to develop sustainable governance through networking;
- a business association setting up a permanent tourism governance group with periodic meetings between enterprises and regional/national public policy makers.

Example pledge with reported progress by Bordeaux Métropole and the Tourism and Convention Office

A new open governance was launched in May 2021 to build together the future of urban tourism and the events activity from a sustainable perspective. The participatory forum on sustainable tourism was the first major concrete step in this process in May 2021. Then, several workshops brought together residents, elected representatives, associations, institutions and professionals during the year, in order to co-build the roadmap for tourism in Bordeaux Metropole 2022-2026. 195 participants gathered during 10 months. This governance will continue to run in the following years to keep on debating and updating the global strategy.

UPDATE: The objective, now that the roadmap is published, is to have an annual event with our main stakeholders (residents, associations, tourism companies, event organisers, elected representatives from our 28 cities, students, sport and culture institutions...13 different types of stakeholders). During this event, we will provide information on the results of the actions and maintain an ongoing dialogue and debate about new opportunities and challenges. The target is to have a high number of residents who feel involved in the tourism strategy in our Resident sentiment index surveys (each two years, the next one will be in 2023).

Progress indicators for topic 5 by 2023 based on reported efforts	Change indicator: Cumulative diversity of Member State origins of the finalists in EU-level Smart Capitals and EDEN/Green Pioneer competitions	
	Base value in 2022	12 in 2022; 16 in 2023
	Expected for 2025	24 (even progress per year)
	Source	GROW desk research

2.2. Green transition

The green transition of tourism comprises several different elements, many of them addressed under both the transition pathway and EU Agenda topics. It is important to note that progress on the green transition is greatly linked with actions under other pillars – digital transition and skills in particular. To track the status of the overall ecosystem, the [EU Tourism Dashboard](#) provides several indicators relevant for the green transition. For example, Figure 3 presents the estimate of the average amount of CO₂ emitted per air passenger per reporting country.

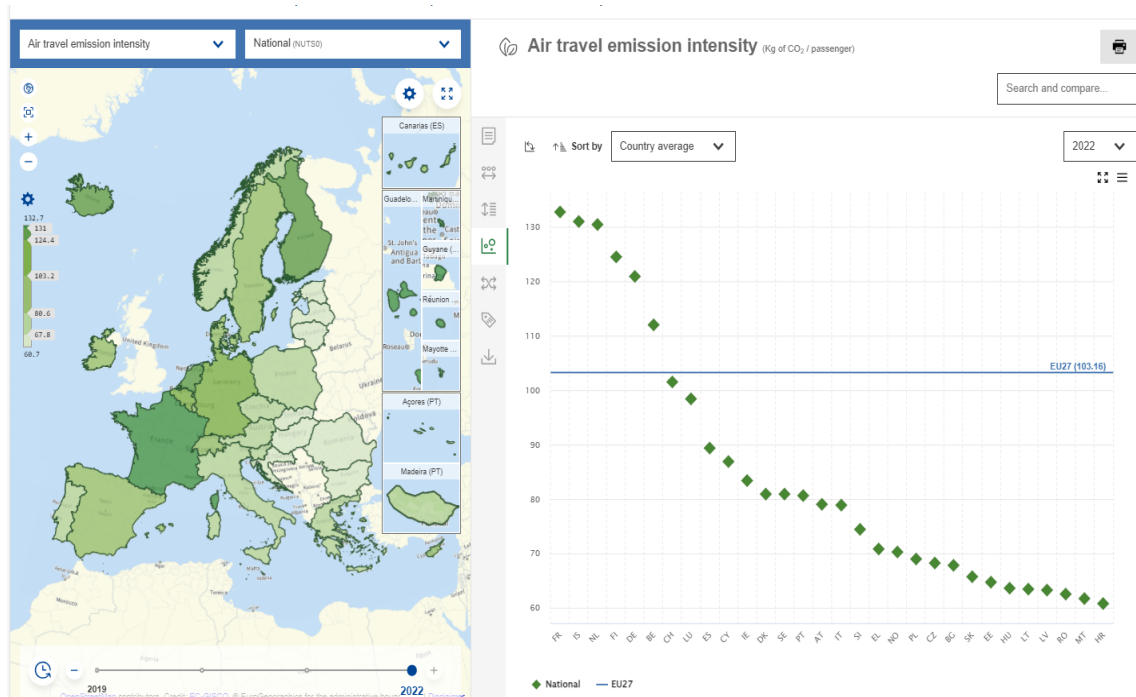


Figure 3: Air travel emission intensity in 2022 ([EU Tourism Dashboard](#))

[EMI Tourism report](#) of the European Monitor of Industrial Ecosystems (EMI) project provides additional information on the progress of the green transition; such information includes GHG emissions, particulate matter, land use, materials extraction and water consumption (Figure 4) for 2021. These values can be followed as indicators of the yearly progress of the green transition in the tourism ecosystem.



Figure 4: Share of tourism’s environmental impact 2021 ([EMI Tourism report](#), based on [Exiobase](#))

2.2.1. Sustainable mobility

Topic 6 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Passenger transport companies to develop greenhouse gas (GHG) reduction plans in line with the Climate Law goals Including the visitor perspective in sustainable mobility plans of cities and regions, even in smaller destinations Improving the appeal of railways for visitors	Commitments and action plans of passenger transport companies Sustainable urban mobility plans, which include the visitor perspective Doubling high-speed rail traffic by 2030
EU Agenda 2030 invites Member States to:	
contribute to the green transition of the tourism ecosystem regarding: transport, e.g. by supporting the decarbonisation of mobility, through innovations, new and breakthrough technologies, the development of multimodal travel and by increasing the attractiveness of sustainable modes of transport for passengers, with particular attention to the needs of the peripheries, less accessible areas, islands and outermost regions; and by promoting active mobility modes, such as cycling and hiking, and encouraging longer stays;	

Commission action: The Commission set out proposals in July 2021 to make all sectors of the EU economy reduce emissions by at least 55% by the end of this decade. The [‘Fit for 55’ legislation](#) sets the EU on a path to reaching its climate targets by 2030; the package of several legislative proposals was [completed by October 2023](#). In October 2023, the Commission proposed a [European declaration on cycling](#) to boost bike use in the EU.

On [sustainable urban mobility](#), the Commission adopted in March 2023 a recommendation^(?) calling on each Member State to put in place a national programme with a dedicated office to help cities with sustainable urban mobility plans (SUMPs). The proposed revision to the TEN-T Regulation [proposes 424 major cities to develop SUMPs](#). In January 2023, the Commission launched support for [10 pilot projects](#) to improve cross-border rail connections across the EU, making them faster, more frequent and more affordable.

Member State action: Sustainable mobility aspects are considered a challenge in 12 Member States, while 7 Member States consider sustainable urban mobility plans that include also visitors’ perspective a priority. Altogether 8 Member States report taking measures to address these issues and 6 have [shared their practices](#) through TAC reporting. Two national administration actors (from Austria and France) have also made pledges on developing sustainable mobility.

Member State example: Hungary

In 2022 the Veszprém-Balaton 2023 European Capital of Culture programme and the Ministry of Construction and Transportation set up an inter-agency task force to coordinate the Green Mobility Action Plan of the ECoC Programme and to ensure the aim that all events of the ECoC programme need to be accessible by public transport.

[Accessibility of the ECoC events](#)

[Veszprém Európa Kulturális Fővárosa | MÁV-csoport](#)

^(?) [EUR-Lex - 32023H0550 - EN - EUR-Lex \(europa.eu\)](#)

Stakeholder action: Key figures for transition pathway topic 6 pledges:

27 pledges	12 Member States	9 organisation types	48% completed / with results
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Stakeholders' pledged actions include:

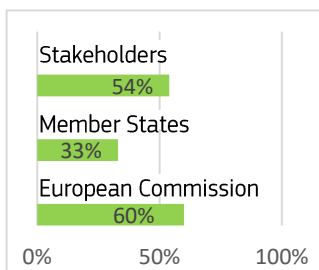
- large companies committing to reducing their emissions and setting targets and emission roadmaps, while providing their customers with sustainable travel options;
- local administrations developing and updating their sustainable urban mobility plans, including improvement of cycling infrastructure;
- regional administrations developing public transport, railways, charging stations and cycling infrastructure, also considering soft mobility options (see example box);
- DMOs setting and following concrete targets for their visitors to use public transport and sustainable transport options.

As a supporting collaborative stakeholder effort, the [Alliance for zero-emission aviation](#) is a voluntary initiative of private and public partners who share the objective of preparing the entry into commercial service of hydrogen-powered and electric aircraft.

Example pledge with reported progress by Pays de la Loire region

The [Pays de la Loire] Region is the organising authority for public transport, and is now the leader in intermodality (train, coach, boat, bicycle). In its roadmap on energy transition, it has included ecomobility among its strong commitments.

The aim is to improve the transport offer and soft mobility for tourists, to offer travellers new experiences (e.g.: without my car, by boat) and to better distribute tourist flows in the region. Numerous actions will be put in place by 2028: development of intermodal solutions, experimentation with solutions for reaching a destination within one-kilometre, attractive pricing policy, simplification of online sales, etc. Cycle tourism is a crucial issue in the Pays de la Loire, and there will need to be more mutualisation in the cycling continuity, from cycle tourism to everyday cycling. By 2025, Pays de la Loire will be the top French destination for cycle tourism. By 2030, 100% of our destinations accessible by green means of transport (soft or collective mobility) and 0% of our destinations exclusively accessible by (individual) car.

Progress indicators for topic 6 by 2023 based on reported efforts	Change indicator: Overnight trips made by train in the EU	
	Base value in 2022	140.1 million (vs. 108.6 million in 2015)
	Expected for 2025	170 million (to support EU target to double high-speed rail traffic by 2030 compared to 2015)
	Source	Eurostat data table tour_dem_ttrr

2.2.2. Circularity of tourism services

Topic 7 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Developing the use of locally supplied ingredients with low environmental footprint to reduce the environmental impact of food service	Tourism/hospitality organisations to reduce food waste following EU-wide targets by 2030
Reducing food waste in the hospitality industry	Halved the amount of non-recycled waste by 2030
Reducing and separating overall waste of tourism services	Reward in 2024 the cities reporting most progress over 2021-2023 in reducing air, water and soil pollution
Increasing water efficiency, reducing water stress and pollution, and improving sanitation	
EU Agenda 2030: Actions	Expected outputs
The Commission and Member States to provide support to tourism services to reduce their environmental footprint in line with the EU objectives and support the improvement of waste and water management and sanitation capacity	Tourism/hospitality organisations to have reduced waste in line with the Waste Directive 2008/98/EC

Commission action: In July 2023, the Commission [proposed a targeted amendment to the Waste Framework Directive \(WFD\)](#). This proposal includes the objective for the Member States to reduce by December 2030 the generation of food waste per capita, jointly in retail and other distribution of food, in restaurants and food services and in households by 30% in comparison to the amount generated in 2020. [In 2020, restaurants and food services represented 9% of total food waste.](#)

On 30 November 2022, the Commission proposed to revise the Packaging and Packaging Waste Directive ⁽³⁾ to contribute to the reusability and recyclability of packaging and reduction of single-use plastics. The [Fit for 55 legislative package](#) also contributes to the [energy efficiency](#) and [increased use of renewable energy](#) across sectors, including tourism.

Member State action: There are 10 Member States that consider the circularity of the tourism industry a challenge, while 14 Member States consider improving waste and water management and reducing pollution of tourism services a priority. A total of 4 Member States have measures in place to reduce the environmental footprint of food services, and 6 have measures to improve waste and water management of tourism services. Altogether 6 Member States [shared their concrete practices](#) through TAC reporting.

Member State example: Croatia

Project “Reduce food waste, cook for your guests” is reducing the amount of bio waste (most of which is food waste) in hotels and ensuring separate collection and disposal of waste generated in the hotels. It was launched in 2021 in two Croatian hotels. The data collected during 2021 show that it is possible to reduce the share of food waste generated during preparation and serving as well as during consumption by 30% to 70%. In 2022, additional eight hotels were included in this project. An [online handbook](#) for hotels has been published.

In cooperation with the hotel staff, measurements are being carried out and reported, results are available in [online report](#).

⁽³⁾ [Packaging waste \(europa.eu\)](#), Procedure [2022/0396/COD](#),

Stakeholder action: key figures for transition pathway topic 7 pledges

21 pledges	9 Member States	4 organisation types	40% completed / with results
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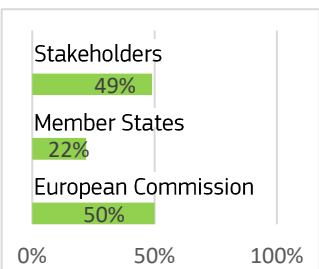
Stakeholders’ pledged actions include:

- large companies developing circular strategies and collaborations to reduce their environmental impact (see example box below);
- regional authorities minimising waste, increasing resource usage efficiency and promoting circularity in their destinations;
- SMEs supporting stakeholders in circular movement through investment, research, and guidance;
- business associations support collaborative building of roadmaps to their sector and dissemination of concrete good practices recognised for the industry;
- an international organisation following global initiatives on climate and plastics reduction in tourism and publishing annual progress reports as support also for EU tourism stakeholders;
- NGOs establishing, supporting and promoting schemes which reduce environmental impacts of tourism service providers and consumption of sustainable products.

Example pledge with reported progress by Costa Group

“Costa Group cruise ships are true floating smart cities: on board we sort and categorize about 100% of waste produced on board (the best in class EU capital, Vilnius, sorts 68%). About 77% of the freshwater used onboard comes also from advanced on board desalination and deperation systems. We are taking the commitment to design by 2025 a circular path for all the key materials ending their lifespan on board and to further increase the share of freshwater produced through desalination and deperation. This could become a source of inspiration for major structures in the hospitality sector.”

Progress reported 2023: 20% of fleet running with LNG, 89.2% of freshwater produced on board.

Progress indicators for topic 7 by 2023 based on reported efforts	Change indicator: Food waste from restaurants and food services per capita									
 <table border="1"> <caption>Progress Indicators for Topic 7 by 2023</caption> <thead> <tr> <th>Entity</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Stakeholders</td> <td>49%</td> </tr> <tr> <td>Member States</td> <td>22%</td> </tr> <tr> <td>European Commission</td> <td>50%</td> </tr> </tbody> </table>	Entity	Percentage	Stakeholders	49%	Member States	22%	European Commission	50%	Base value in 2022	12 kg/person (latest value for 2020 and 2021)
	Entity	Percentage								
	Stakeholders	49%								
Member States	22%									
European Commission	50%									
Expected for 2025	10.2 kg/person (reduction of 15% from 2020 value supporting EU objective to reduce food waste by 30% by 2030)									
Source	Eurostat table env_wasfw									

2.2.3. Green transition of tourism companies

Topic 8 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Tourism companies, including SMEs, to register to EMAS.	Increased number of EMAS registered tourism organisations
Tourism accommodations, including SMEs to apply for the EU Ecolabel or other EN ISO 14024 type I ecolabels or equivalent voluntary labels, which are independent, multi-criteria based and third party verified.	Increased number of EU Ecolabel tourism services or accommodations awarded with other EN ISO 14024 type I ecolabels or equivalent voluntary labels which are independent, multi-criteria based and third party verified
Capacity-building programmes, technical and financial assistance for SMEs to engage in environmentally friendly practices and schemes.	Increased involvement of SMEs in ecological certification schemes
Tourism operators to use relevant EU Green public procurement (GPP) criteria where applicable.	Increased use of relevant EU GPP criteria in purchasing tourism ecosystem services
EU Agenda 2030: Actions	Expected outputs
The Commission, Member States and other relevant levels of public authorities to provide support to SMEs to engage in environmentally friendly practices and schemes, such as EMAS, EU Ecolabel, other EN ISO 14024 type I ecolabels or equivalent third-party verified voluntary labels.	Increased number of EMAS-registered tourism organisations Increased number of EU Ecolabel tourism services or accommodation awarded with other EN ISO 14024 type I ecolabels or equivalent voluntary labels
The Commission and Member States to use relevant green public procurement (GPP) criteria where applicable when procuring tourism-related services (events, hospitality, travel).	Increased use of relevant GPP criteria in purchasing tourism ecosystem services;

Commission action: The Commission supports the [EU Eco-management and Audit Scheme \(EMAS\)](#) for all economic sectors, including tourism. SMEs can register for a lighter version of the scheme. By June 2023, there were 374 tourism-related organisations [registered to EMAS](#). 71% of them were SMEs with between 10 and 249 employees (around 268 enterprises), while 16% were large companies with above 250 employees (61 registered companies) and 12% were micro-enterprises with less than 10 employees (45 companies).

The [EU Ecolabel](#) is a ‘best of class’ type of label which can be awarded to tourist accommodation services with excellent environmental performance. Tourist accommodation establishments have shown increasing interest in the EU Ecolabel, with 138 new licences (+30%) between March 2022 and September 2023, raising the total number of EU Ecolabel tourist accommodation services to 620. To reduce application costs, special discounts on EU Ecolabel fees exist for SMEs, micro-enterprises, EMAS or 14001-registered companies and applicants from developing economies. Partial data collected from the EU Ecolabel Competent Bodies in October-November 2023 show that of 467 EU Ecolabel licences awarded to tourist accommodation establishments that provided the information, 257 have been awarded to micro-enterprises, 202 to SMEs and only 8 to large companies.

SMEs receive Commission support to develop their activities under COSME and Single Market programmes. The [TOURCOOP call awarded EUR 6 million to 6 projects](#) which

provided in 2022-2023 support to approximately 900 SMEs in their sustainable tourism development and capacity. In December 2023, the Commission opened [a call of EUR 8.5 million to support SMEs to transition towards a more sustainable and resilient ecosystem](#).

Member State action: Based on TAC reporting, 5 Member States consider helping SMEs to engage in environmentally friendly practices a challenge, and 7 consider using green public procurement criteria for procuring tourism-related services (travel, hospitality, catering) as challenging. For both aspects, 10 Member States consider them a priority. However, they more often have measures to support SMEs (11 Member States) than to tackle the use of green public procurement criteria (4 Member States). Altogether 6 Member States [shared examples of their concrete practices](#) through TAC reporting, while 2 (Finland, Estonia) have also made specific pledges on supporting the green transition of tourism companies.

Member State example: Finland

“Finland has a national sustainable tourism development programme "Sustainable Travel Finland (STF)", which is designed for both destinations and tourism companies. It truly brings the entire tourism ecosystem together, and each stakeholder has a role to play in STF programme.

- The STF programme has 7 educational steps to adapt sustainability. While each step aligns with international standard, the programme is adapted to the Finnish context, and each step provides educational content to meet the criteria. Companies and destinations that undergo the entire programme, and meet the criteria, will be awarded with STF label.
- One of the steps is obtaining a certificate, onsite audited by a third party. When the company or destinations submits the application for STF label, the applications are verified by 3rd party (online audit).
- The program includes training and awareness raising for the companies to get certified, and finally promotional incentives for those companies and destinations awarded with STF label. STF labelled companies and destinations are prioritised in Visit Finland's promotion.
- By September 2023, 367 companies and 5 destinations have received Sustainable Travel Finland label
- The goal of STF is to get all key players in the industry enrolled for STF programme and certified by the end of 2025.

- The results (of those enrolled and awarded with STF label) are available online: <https://www.visitfinland.fi/suomen-matkailudata/sustainable-travel-finland-tilastot>, however the reporting system does not yet include final goals. This is, because we do not know the number of businesses and destinations relevant to STF programme. The action we intend to take, includes defining the size of the entire tourism industry (our target market), as this will clarify the goal in numbers.”

Stakeholder action: key figures for transition pathway topic 8 pledges:

45 pledges	14 Member States	10 organisation types	47% completed / with results
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Examples of concrete action pledges by stakeholders include:

- sectoral business associations setting roadmaps for their sector and supporting their members across countries, while place-based associations (such as chambers of commerce) support SMEs in their locality (see example box below);
- some SMEs monitoring and reducing their own environmental footprint with the help of environmental labels and certification schemes, while some provide their consultancy services to help others progress on the green transition;
- large companies setting concrete objectives on reducing their own environmental impact and establishing schemes to support their partners and collaborators in environmental impact reduction;
- DMOs organising upskilling/reskilling of tourism providers in their destination about the green transition, setting up local sustainability roadmaps and targets for the companies' engagement;
- NGOs implementing capacity-building and certification programmes, providing regular awards, publishing best practice materials for tourism businesses.

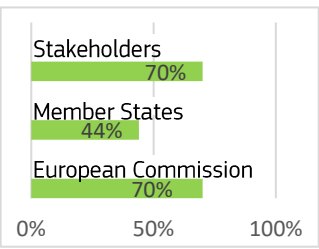
Example pledge with reported progress by ECTAA

“ECTAA is implementing a COSME funded project, called SUSTOUR, whose objective is to develop and update existing standards, training material and tools to effectively implement sustainability within tour operators and their supply chain. Key focus areas are the management of carbon and plastics, two of the key environmental impacts of the travel sector.

Moreover, the project will provide free technical support for travel agents and tour operators that want to improve their sustainability performance. They can choose to obtain support towards certification or support to implement innovative practices in terms of carbon, plastic and supply chain management or certification of shore excursions.

ECTAA is co-financing the project and its specific contribution to the project tasks include supporting 629 small and medium-sized travel agents and tour operators in 35 European countries by year 2023 (the initial project objective was to support a minimum of 175 SMEs).

Once the project is completed in 2023, the intention is to continue collaboration with the project partners and ECTAA Members to promote the uptake of the tools and standards, as well as certification of travel agents and tour operators. ECTAA will concretely aim to help 10 000 SMEs yearly with these tools.”

Progress indicators for topic 8 by 2023 based on reported efforts	Change indicator: Number of EU tourist accommodation services, which have adopted reliable environmental schemes or labels (see indicator description from EU Tourism Dashboard)									
 <table border="1"> <caption>Progress Indicators for Topic 8 by 2023</caption> <thead> <tr> <th>Entity</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Stakeholders</td> <td>70%</td> </tr> <tr> <td>Member States</td> <td>44%</td> </tr> <tr> <td>European Commission</td> <td>70%</td> </tr> </tbody> </table>	Entity	Percentage	Stakeholders	70%	Member States	44%	European Commission	70%	Base value in 2022	5.652
Entity	Percentage									
Stakeholders	70%									
Member States	44%									
European Commission	70%									
Expected for 2025	8.000 (targeting strong acceleration, 800 new registrations per year)									
Source	EU Tourism Dashboard : Adoption of environmental labels and schemes									

2.2.4. R&I projects and pilots on circular and climate-friendly tourism

Topic 12 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Tourism stakeholders engaging in public-private co-operation to prepare research proposals for funding calls that accommodate circular tourism-related R&I projects and pilots</p> <p>Developing models and transferable practices for sustainable tourism</p> <p>Establishing large-scale pilots on sustainable tourism, e.g. on islands and remote regions, including the outermost regions</p>	Validated and transferable circular and climate-friendly tourism models for different implementation levels
EU Agenda 2030: Actions	Expected outputs
<p>The Commission and Member States to support the development of models and transferable practices for sustainable tourism</p> <p>DMOs and relevant levels of public authorities to support establishing large-scale pilots on sustainable tourism across the EU, including on islands and in outermost regions</p>	<p>Validated and transferable circular and sustainable tourism models</p> <p>Best practices on destination pilots with holistic circular models</p>

Commission action: The Commission's key support instrument for research and innovation (R&I) is the Horizon Europe framework programme (2021-2027). The programme has opened several relevant calls in 2022-2023, which can support sustainable tourism development: [Systemic circular solutions for a sustainable tourism](#), [Cultural heritage and cultural and creative industries](#), and [New European Bauhaus for urban food system transformation](#). Based on the CORDIS database, by October 2023, R&I funding under H2020/Horizon Europe had been given to [278 projects](#) with links to tourism, sustainability, climate and circularity.

The [EU Cluster collaboration platform](#) includes 41 cluster organisations or initiatives dedicated to tourism, most supporting development of sustainable tourism. In addition, development of environmentally friendly tourism through pilots, practical solutions and innovative actions was supported in 2022 under the [Single Market Programme call with the budget of EUR 20.5 million](#) and through the [European Regional Development Fund \(ERDF\)](#) which under shared management supports local authorities to call for projects adapted to their needs.

Member State action: Development of transferable practices or establishing pilots on circular and sustainable tourism is considered a priority in 10 Member States, while 11 have established specific measures. There are 6 Member States that have [shared example practices](#) through their TAC reports.

Member State example: Austria

Nineteen Pilot regions were involved in the development of the new Austrian Eco-Label for tourism destinations (available since January 2022). The first ones will likely be certified in 2023.

<https://www.umweltzeichen.at/de/tourismus/destinationen>

Stakeholder action: key figures for transition pathway topic 12

17 pledges	11 Member States	7 organisation types	53% completed / with results
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Stakeholders' concrete actions include:

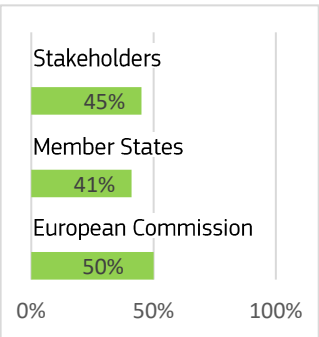
- regional administrations dedicating funding to supporting development of sustainable tourism projects for specific types of tourism and in rural areas (see example box);
- NGOs participating in R&I projects in sustainable tourism and striving to effectively disseminate results across projects to stakeholders who could make use of them;
- SMEs combining research and education in their ecological tourism models and participating in R&I collaborations;
- local administrations participating in European R&I collaborations and pilot activities to develop sustainability solutions which they can put in practice.

Example pledge with reported progress by Pays de la Loire region

“A Tourism Innovation Development Network (RDIT), with the collaboration of the Tourism Innovation Lab in Angers, initiated in 2020 a collective intersectoral regional dynamic which must be continued to stimulate innovation in the tourism market. The underlying objectives are to better support innovative project leaders and to encourage tourism and non-tourism companies interested in the tourism market to make greater use of innovation, in collaboration with our partners such as incubators, technopoles, competence centres, ...

This support will focus on the key sectors of tourism of our territory: nature tourism in connection with the national parks by supporting environmental excellence, agrotourism and wine tourism which were strongly supported during the last programming period (more than 150 projects financed between 2016 and 2021), nautical tourism (e.g. the CAPITEN project financed by Interreg Atlantic Area).

Over the period 2022-2028, we will extend our area of focus to sustainable cultural tourism via a dedicated regional call for projects in order to further exploit the tourism potential of heritage sites and monuments with the aim of developing their attendance, modernising their offers, and making them evolve in line with the expectations of customers.”

Progress indicators for topic 12 by 2023 based on reported efforts	Change indicator: Number of ongoing EU-funded R&I projects linking with environmentally sustainable tourism									
 <table border="1"> <caption>Progress indicators for topic 12 by 2023 based on reported efforts</caption> <thead> <tr> <th>Stakeholder</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Stakeholders</td> <td>45%</td> </tr> <tr> <td>Member States</td> <td>41%</td> </tr> <tr> <td>European Commission</td> <td>50%</td> </tr> </tbody> </table>	Stakeholder	Percentage	Stakeholders	45%	Member States	41%	European Commission	50%	Base value in 2022	112
	Stakeholder	Percentage								
	Stakeholders	45%								
Member States	41%									
European Commission	50%									
Expected for 2025	200 (including also EU funding programmes other than Horizon Europe)									
Source	CORDIS search for ongoing projects in 2022 with search words 'tourism AND (sustainability OR climate OR circularity)' / from 2024 onwards: T4T stakeholder support platform list of EU-funded R&I projects on sustainable tourism									

2.2.5. Product environmental footprint methodology

Topic 13 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Supporting the uptake of PEF/OEF methods in tourism industries to collect baseline data for sectoral category rules development</p> <p>Developing category rules for typical tourism products and services taking into account different tourism contexts (e.g. remote locations)</p> <p>Developing tools to support tourism companies to make PEF/OEF assessments of their products and services</p>	<p>Common environmental benchmarks exist for key tourism products and services, which are used by public and private organisations</p>
<p>EU Agenda 2030 invites the Commission to:</p> <p>... test the use of environmental footprint methodologies for the tourism ecosystem;</p>	

Commission action: The Commission adopted a proposal for a directive on green claims in March 2023 ⁽⁴⁾ highlighting the need to substantiate businesses' environmental claims. The proposal complements and further concretizes the proposal for a directive ⁽⁵⁾ on empowering consumers in the green transition. To explore and support the use of the [Environmental footprint methods](#) to measure and communicate the life cycle environmental performance in tourism, the Commission [launched in 2023 a pilot project supported by the European Parliament](#), which aims to develop product environmental footprint category rules (PEFCR) and gather related datasets for use in the hotel accommodation sector. Hotel industry stakeholders are closely involved in this work.

Member State action: As the product environmental footprint method was not included in the work programme for the EU Agenda for Tourism 2030, it was not covered by the TAC reporting. Member States called for the Commission to explore the potential of this methodology for the tourism ecosystem; the results of this work will provide evidence for Member States to decide on their path of action.

Stakeholder action: Key figures for transition pathway topic 13 pledges

5 pledges	3 Member States	4 organisation types	40% completed / with results
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Progress indicators for topic 13 by 2023 based on reported efforts	Change indicator: Existing product environmental footprint category rules and calculation support datasets for tourism services	
<p>Stakeholders: 2%</p> <p>European Commission: 30%</p> <p>0% 50% 100%</p>	Base value in 2022	No
	Expected for 2025	Yes
	Source	DG GROW desk research

⁽⁴⁾ [Proposal for a Directive on green claims \(europa.eu\)](#), procedure [2023/0085/COD](#).

⁽⁵⁾ [Proposal for empowering consumers in green transition \(europa.eu\)](#), procedure [2022/0092/COD](#).

2.3. Digital transition

The digital transition of the tourism ecosystem is a key enabler for greener and more resilient tourism practices. Figure 5 shows the [EU Tourism Dashboard](#) index of selected indicators on the digital transition (see reading guide in Annex IV).

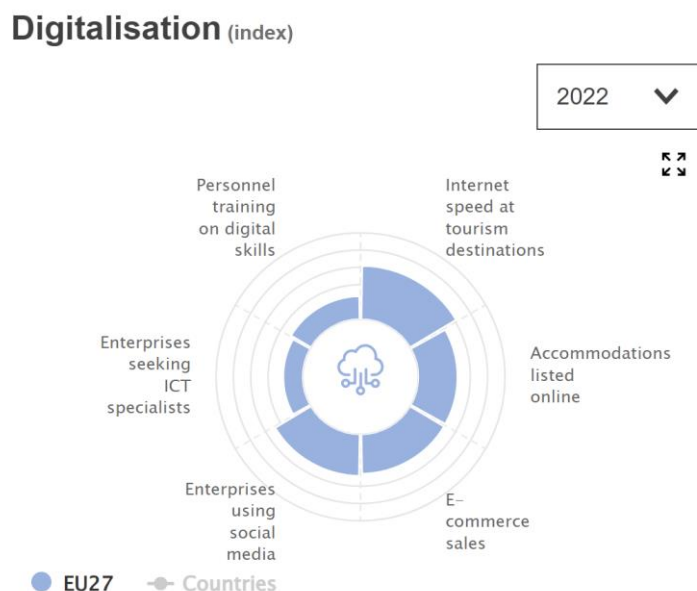


Figure 5: Digital transition index ([EU Tourism Dashboard](#))

[European Monitor of Industrial Ecosystems \(EMI\) project](#) analysed digital technology start-ups in tourism and conducted a survey to tourism SMEs on their adoption of specific digital technologies. The project found that several types of technologies were being taken up, targeting different groups of tourism actors, most often tourism service providers, as shown in Figure 6.

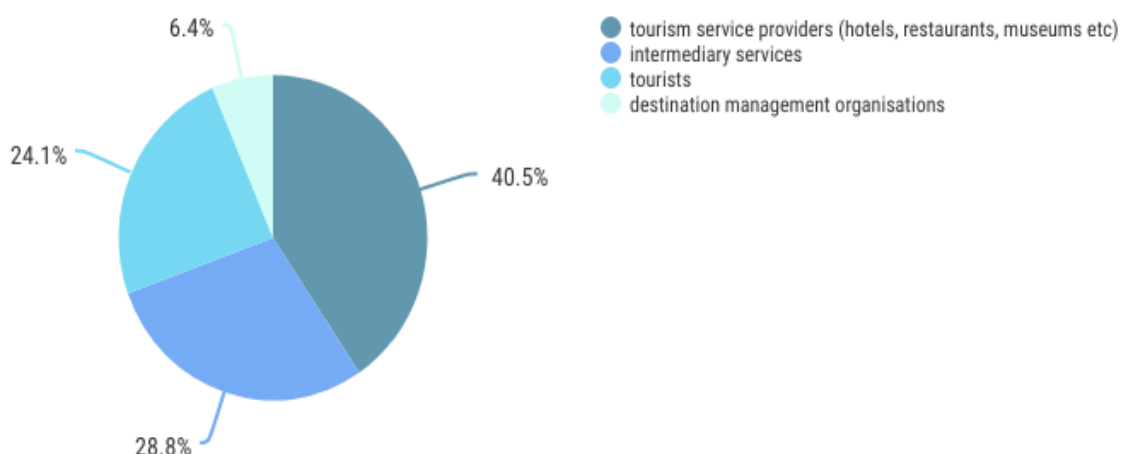


Figure 6: Target groups for technology start-ups in tourism ([EMI Tourism report](#))

2.3.1. Innovative and data-driven tourism services

Topic 9 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Increasing use of data sharing in personalised tourism services and destination management, monitoring and service provision, including the creation of new platforms among SMEs	Increased offer of personalised tourism services
Use of artificial intelligence and data-based innovation, such as local digital twins for predictive planning to accurately meet demand and increase resource efficiency of services	Increased take-up of data-driven destination management tools
EU Agenda 2030 invites Member States to:	
facilitate the digital transition in tourism and support the tourism industry and sustainable management of destinations, in particular by: ... support the development and implementation of innovations in the tourism sector	

Commission action: The Commission supports the development of innovative digital tourism SMEs through the single market programme, European Innovation Council funding, and the EU digital innovation hubs (EDIHs). In October 2023, the [EDIH catalogue](#) showed that 45 EDIHs are supporting SMEs in the ‘travel and tourism’ sector.

The [Enterprise Europe Network](#) sector group on tourism (EEN SGT) is composed in 2023 of 84 members from 29 countries that regularly collaborate to support the tourism ecosystem actors in their territories. The focus is on EU funding possibilities, technology transfer and business opportunities, together with supportive communication and promotion activities. Digitalisation is an area of focus, and the EEN SGT supports ambitious growth-oriented SMEs’ access to information and making the best possible use of it. In October 2023, the [EEN partnering opportunities](#) included 163 profiles with the keyword ‘tourism’.

The [EMI survey of tourism SMEs](#) showed that advanced technologies are already being taken up in innovative companies: 25% were using cloud technologies, 13% were using big data, 8% had adopted artificial intelligence and 5.8% mentioned using digital twins.

Member State action: A total of 17 Member States considered it a priority to support developing innovative personalised tourism services and/or data-driven destination management, and 9 have introduced specific measures to tackle these issues. There are 7 Member States that have [shared their best practice examples](#) in their TAC reports, while 2 have made pledges on this topic.

Member State example: Portugal

“Portugal developed Tourism 4.0, a dedicated innovation strategy for the sector, aiming to accelerate the adoption of innovation both at destinations and businesses level.

This includes creating an innovation ecosystem with more than 50 incubators in the country and the implementation of around 15 innovation programs per year (Fostering Innovation in Tourism initiative). In the last 5 years, we developed 70 innovation programs, with more than 1 400 startups participating.”

<https://business.turismodeportugal.pt/pt/Conhecer/Inovacao/programa-fit/Paginas/default.aspx>

Stakeholder action: key figures for transition pathway topic 9

11 pledges	9 Member States	7 organisation types	27% completed / with results
---------------	--------------------	-------------------------	---------------------------------

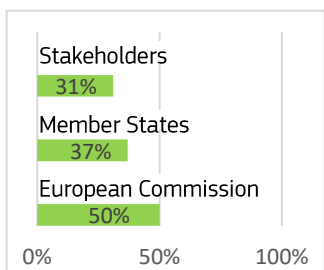
Concrete actions by stakeholders depend on their operating contexts and objectives and include:

- SMEs developing tools for data-based destination management and for tourism information services which can be used to follow tourism flows as part of destination intelligence (see example box);
- regional administrations providing digital tools for their tourism service providers as well as for tourists to find information on tourism options and make bookings;
- a large company affirming their preparedness and interest to share their data with destinations to support data-based destination management decisions;
- a national DMO providing platforms for data sharing and improving the competitiveness of the tourism industry in their country.

Example pledge with [reported progress](#) by SmartGuide

“SmartGuide pledges to collect, aggregate, analyse and offer to tourism boards precise geolocated data on the behaviour of tourists. This big data includes street-level destination heatmaps with unprecedented precision (based on GPS, not telecom BTS), we know what tourists from different countries do, where they spend their time, what content they consume, what they find boring, and what interests them. Destinations and tourism boards can use this understanding for Smart Destination Management and marketing like never before.

At this point, we are collecting 10s of millions of data points yearly which allows insight such as these mentioned above. By 2025, we aim to collect 5 billion geolocated activities per year and provide the most robust data on the behaviour of tourists for those destinations where guides have been created to be available for the tourists.”

Progress indicators for topic 9 by 2023 based on reported efforts	Change indicator: Take-up of one or more advanced technologies (cloud, AI, big data) by tourism companies	
 <p>Stakeholders 31%</p> <p>Member States 37%</p> <p>European Commission 50%</p> <p>0% 50% 100%</p>	Base value in 2023	31.2% (survey conducted in 2023)
	Expected for 2025	48% (on a path to reach 75% by 2030 in line with Digital Decade targets)
	Source	Annual EMI project survey of tourism SMEs

2.3.2. Availability of online information on tourism offer

Topic 10 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Improving the online availability of validated information on sustainable, accessible, or specifically targeted tourism offers</p> <p>Developing partnerships with on-line portals and booking platforms to provide more visibility to certified accommodation providers</p> <p>Ensuring information is available on consumer rights and dispute resolution mechanisms for tourists via the European Consumer Centre Network's digital channels</p>	<p>Improved perceptions of EU citizens on the availability of trustworthy information on tourism services and characteristics</p>
EU Agenda 2030 invites Member States to:	
<p>facilitate the digital transition in tourism and support the tourism industry and sustainable management of destinations, in particular by:... improving the availability of comprehensive online information on the tourism offer on subjects including sustainability, accessibility and target audiences</p>	

The [2021 Eurobarometer survey on Attitudes of Europeans towards tourism](#) confirmed that the preferred booking channels for tourism/travelling of people in the EU are online websites and platforms. [Digitalisation surveys](#) show that of the 75% of respondents reporting to have bought or ordered goods or services online in 2022, 30% ordered deliveries from restaurants, 30% rented accommodation, 29% bought tickets to cultural or other events, and 28% purchased transport services. EU tourism services need accommodate these customers, by providing information of available services in an efficient and reliable way, and informing them about their consumer rights.

Commission action: Responsibility for providing reliable information on available services lies with the service providers. However, to help consumers defend their rights, the Commission supports national offices of the European Consumer Centre Network (ECCNet) in providing clear information on the rights of tourists/travellers, including on dispute resolution mechanisms.

Member State action: The EU Agenda 2030 work plan and hence the TAC reporting did not include the provision of online information on tourism services. However, 2 Member States (Finland and Slovakia) have made pledges to support their stakeholders.

Member State example: Finland

- Visit Finland has launched DataHub for Finnish travel products that enables multichannel visibility for Finnish travel products
<https://datahub.visitfinland.com/>

- There are currently over 30 channels utilizing the DataHub data via API and therefore giving the travel products great visibility (from DMO's to different travel startups and travel tech companies and platforms)

- There are currently over 2000 travel companies using DataHub and 7000 travel products in DataHub

- Travel products can be filtered based on sustainability and STF label is shown for travel products that have it

In addition Visit Finland is negotiating with online platforms on providing visibility to the services and destinations which have been provided the Sustainable Travel Finland label. The goal is to have the STF label visible on at least two major international digital platforms by end of 2024.

Stakeholder action: key figures for transition pathway topic 10 pledges:

17 pledges	10 Member States	8 organisation types	53% completed / with results
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Examples of stakeholders' actions on improving online information include:

- several SMEs providing tools to make visible officially communicated tourism offer as well as information generated by local users as guides that are made available for free or for fee (see example box below);
- DMOs and regional administrations providing platforms and websites to showcase reliable information on tourism offer in their locality, guiding tourism companies on making their services discoverable (see example box below);
- an NGO systematically increasing available online information on sustainable tourism itineraries across different countries.

Example pledge with reported progress by AR vision 2049 S.L.

“Make curated, official and trustworthy information about tourist destinations and points of tourist and cultural interest freely accessible to citizens and tourists from anywhere in the world. The information will be available in various languages and formats to make it universally accessible.

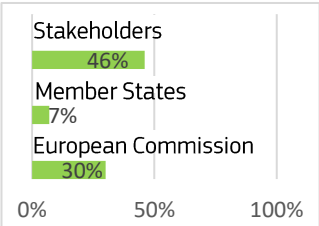
All the information will be available both in our app CultuAr and through the tourist destination website for citizen and visitor convenience.

Our goal is to receive and fulfill over 30 million request for information about at least 30 000 points of interest by 2025.”

Example pledge with reported progress by Netherland Board of Tourism

“As of 2022, on our own digital channels Holland.com and the corresponding social channels (VisitNL) we focus on sharing sustainable travel stories, by highlighting the lesser known "off the beaten track" places to visit and sharing stories from locals. We target on nearby markets, because for these markets traveling sustainably to our country is a realistic option. In the end of 2023 this new content scope for Holland.com will be fully implemented.

We encourage our local partners and SMEs to publish their offer on online booking services. By publishing knowledge papers we inform them on how to make their online offerings better discoverable to tourists.

Progress indicators for topic 10 by 2023 based on reported efforts	Change indicator: Share of EU tourism companies with a website	
	Base value in 2023	84% (web-based analysis Q3/2023)
	Expected for 2025	90% (to support Digital Decade target of 90% of SMEs having at least basic digital intensity by 2030, starting with a website)
	Source	Annual EMI Tourism report

2.3.3. Common European data space for tourism

Topic 9 and 14 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Stakeholder cooperation to agree common practices (Code of Conduct) and to actively share tourism-related data in a European Tourism Data Space (topic 9)	Code of Conduct for data sharing to be agreed by stakeholders by 2022 (topic 9)
Stakeholders to implement a preparatory action for tourism data space, considering interoperability with all European data spaces and alignment with the Data Act (topic 14)	Results of the coordination and support action to be launched in 2022 under Digital Europe programme (topic 14)
EU Agenda 2030: Actions	Expected outputs
National, regional and local authorities and DMOs to publish open datasets of relevance for tourism services – data on public transport, museum collections and visitors, etc.	Examples of open public datasets in significant tourism regions by 2025, which can be used in developing tourism-related services

Commission action: The [European Data Governance Act](#) became applicable on 21 September 2023. It includes data sharing, for example, on mobility data and statistics, which both are important areas for tourism and highlighted in the [open data legislation](#) as high-value datasets. Following the June 2022 [Communication on the Conference on the future of Europe](#), the Commission published in July 2023 a [Communication on a common European data space for tourism](#). It outlines key considerations for such a data space, informs of an upcoming data sharing test case and proposes options for governance, such as setting up an European Digital Infrastructure Consortium (EDIC). Two preparatory actions funded under the Digital Europe Programme (DEP) published in November 2023 a [draft blueprint](#) for building common infrastructural support for this data space, to be implemented under the [DEP call of EUR 8 million opened in September 2023](#). Data generated under the [Regulation on short-term rentals](#) could contribute to data sharing objectives within this space.

All common European data spaces aim to be interoperable, and for example the [common European mobility data space](#) and the [common European cultural heritage data space](#) are very close to the tourism ecosystem. The latter builds on the [Europeana initiative](#) and is supported by a [recommendation](#) calling for Member States to digitise all monuments and sites that are at risk of degradation and half of all monuments that are highly frequented by tourists by 2030. To scale up 3D digitisation and support progress towards the targets, the Commission launched in 2023 the [Twin it! campaign](#) to mobilise all 27 Member States to creating a pan-European collection of high-quality 3D digitised heritage assets.

Member State action: In total 11 Member States reported that tourism relevant data sharing as a priority, and 7 had undertaken specific measures. Only 3 Member States [shared their practices](#) through TAC reporting. In addition, 1 Member State (Austria) has presented a pledge on the topic.

Member State example: Ireland

“Fáilte Ireland, the national tourism development authority is making certain data available under the Government Open Data Initiative. Currently there are three data sets available to the public with relevance to tourism services.”

[Accommodation](#)
[Activities](#)
[Attractions](#)

Stakeholder action: key figures for transition pathway topic 14 pledges

10 pledges	6 Member States	6 organisation types	40% completed / with results
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Concrete actions set out in the stakeholder pledges include:

- SMEs helping with the preparations for the common European data space for tourism while also developing their own data sharing platforms and engaging more actors in data sharing through mechanisms and practices they put in place;
- an DMO setting up a national data space for tourism in collaboration with cross-border activities at EU level (see example box);
- NGOs and business associations participating in the preparatory actions for the common European data space for tourism, thereby keeping their members informed and their interests taken into account;
- a regional administration developing a data lake for a digital tourism observatory with data analysis intelligence tools and annual expansion of data sources.

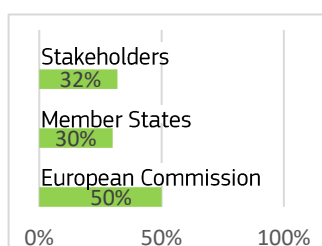
As a key collaborative effort, EU tourism stakeholders have developed and published in March 2023 a joint [Code of Conduct on Data Sharing in Tourism](#) to build trust between tourism stakeholders and encourage the sharing of data on tourism by public and private actors. Twenty organisations representing EU tourism ecosystem have signed the Code.

Example pledge with [reported progress](#) by Austrian national tourism office

“Building the national Data Space Tourism, we are in exchange with international and European associations and initiatives (e.g. DATES, IDSA/ DSSC, AURORAL Project). We operate the national data space on GAIA-X standards. The memorandums of association with the partners will be officially signed in May 2023 (Modul university, Ministry of Labor and Economics of Austria and Data Intelligence Offensive DIO) and the data space official website will be launched in summer 2023.

We cooperate with an Austrian startup Nexyo installing Gaia-X compliant connectors for data exchange and we have currently several use cases ongoing with the use of mobile provider data and 3 to 4 project partners. We are currently starting a cooperation with German Mobility Data Space where we will work on a joint use case (German travellers going on vacation to Austria and facing traffic jams) where we will exchange data between two data spaces. The use case will be kicked-off in the next months and will be completed in 2024.”

Progress indicators for topic 14 by 2023 based on reported efforts



Change indicator: Number of tourism-related datasets provided by EU Member States at data.europa.eu

Base value in 2023	4969 (4 December 2023)
Expected for 2025	7669 (increase of 50 datasets per Member State per year)
Source	Online query to data.europa.eu portal with keyword “tourism”

2.3.4. R&I for digital tools and services in tourism

Topic 15 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Data-driven destination management models and mechanisms	Solutions for data-driven local destination management to monitor carrying capacity and wellbeing
Innovative tourism services using advanced technologies (virtual reality, augmented reality, AI) and digitised cultural heritage	Pilot services to enhance tourism experiences through extended and augmented reality, big data and AI
EU Agenda 2030: Actions	Expected outputs
The Commission, Member States and other relevant public authorities to support data-driven sustainable destination management development	Best practices to monitor carrying capacity and well-being of local residents by 2025
The Commission and Member States to support innovative tourism services using advanced technologies (virtual/augmented reality, AI) and digital and digitised cultural heritage	Examples of innovative services and partnerships to provide tourism experiences through virtual, extended and augmented reality, big data and AI by 2025

Commission action: In 2022 and 2023, Horizon Europe has supported digital developments in the tourism ecosystem, both through targeted calls for digitalisation ⁽⁶⁾ and work programmes that promote digital tools among the means to develop cultural tourism, tourism in rural and remote areas, and sustainable circular tourism. In March 2022, the Commission launched 9 projects supported in total with EUR 9 million to enhance digital innovation in over 700 SMEs ⁽⁷⁾. The Commission also launched in 2022 the European Parliament [pilot action](#) on identifying and developing digital tools and solutions for the restaurant sector.

Member State action: A total of 13 Member States consider it a priority to support the development advanced technologies in the tourism ecosystem, but only 4 report having specific measures in place. From respondents, 4 Member States [shared their practices](#) in their TAC reports. In addition, 2 Member States (Austria and Estonia) have made pledges on the topic.

Member State example: Croatia

“The [Croatian] Ministry of Tourism and Sport has published public call within the National Recovery and Resilience Plan; for Regional diversification and specialization of Croatian tourism through investments and development of tourism products with high added value.

The total amount of grants available in this call is EUR 123,432,211.82. The call was published in October 2022, and is currently in the phase of evaluation. The call will support projects that will contribute to the development of new or significantly improved services, products and processes based on innovative green and digital technologies.“

⁽⁶⁾ [Funding & tenders \(europa.eu\)](#) -- A European Collaborative Cloud for Cultural Heritage – Innovative tools for digitising cultural heritage objects

⁽⁷⁾ [Boosting tourism in the digital era \(europa.eu\)](#)

Stakeholder action: key figures for transition pathway topic 15 pledges

12 pledges	8 Member States	7 organisation types	33% completed / with results
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Concrete actions by stakeholders include:

- SMEs developing innovative products and functionalities for tourism services and destination management making use of advanced digital technologies such as machine learning and artificial intelligence (AI);
- DMOs encouraging their cultural heritage service providers to develop and use digital experiences by providing a toolkit and organising workshops;
- a business association supporting their members to secure investment to develop digital technology-based solutions such as platforms, AI, virtual reality (VR);
- an international organisation building a network of institutions interested in working together on digital R&I to achieve the objectives of the transition pathway.

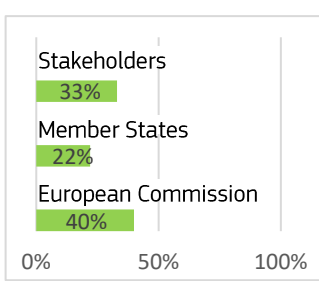
Example pledge with reported progress by Arctur

“Flows is an innovative solution for data-driven local destination management to monitor carrying capacity and well-being. FLOWS enable GDPR-compliant advanced analyses and forecasts of tourist movements based on anonymised data from multiple sources (traffic counters, data from mobile operators, freely accessible Wi-Fi networks, tourist tax, etc.). A simple user interface will display traffic flows: excessive traffic loads, seasonal deviations, entrances/exits to the destination, movement within the destination, etc. It displays the analyses in the selected time interval (year, month, week, day), forecasts based on historical data, weighted by special parameters (weekend, weather, national or holiday in other countries, etc.). FLOWS analysis enables us to predict the tourist flows and make the right decision for supporting the development of balanced and geographically distributed sustainable tourism. With FLOWS, we can influence the tourist flows and their behaviour. The system will collect up-to-date data on visits to support the sustainable rerouting of Alpine flows.

Our commitment until 2025:

We aim to implement T4.0 Flows on an EU level and to support at least 5 tourist destinations to make better destination management decisions by using the information on tourism flows.

We commit to actively sharing our knowledge on the EU level on tourism flows management in at least 10 national and international events for tourism stakeholders/per year.”

Progress indicators for topic 15 by 2023 based on reported efforts	Change indicator: Number of ongoing EU-funded R&I projects linking with tourism and digital technologies	
	Base value in 2022	99
	Expected for 2025	200 (including also other EU programmes than Horizon Europe)
	Source	CORDIS search for ongoing projects in 2022 with search words: ‘tourism AND (digital OR technology)’ / from 2024 onwards: T4T platform

2.3.5. Digitalisation of tourism SMEs and destinations

Topic 16 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Raising awareness of tourism SMEs on the benefits of digitalisation and on existing European, national and regional digitalisation programmes for SMEs</p> <p>Developing a searchable inventory on existing transferable digital tools and practices for SMEs and destinations</p> <p>Establishing a community of practice and a shared toolbox for data-driven destination management</p>	<p>90% of tourism SMEs have reached a basic level of digital intensity by 2030 and participate in the tourism digital value chain</p> <p>Online inventory of transferable tools and practices published by 2023</p> <p>Community of practice and toolbox for data management in destinations by 2023</p>
EU Agenda 2030: Actions	Expected outputs
<p>The Commission, Member States, other relevant public authorities and DMOs to raise awareness among tourism SMEs of the benefits of digitalisation and to support tourism SMEs and start-ups through digitalisation programmes</p> <p>The Commission to collect and share best practices on digital tools and practices for tourism</p>	<p>Tourism SMEs to have reached a basic level of digital intensity by 2030 in line with the Digital Compass objectives</p> <p>Searchable collection on transferable digital tools and practices for tourism published by the Commission by 2023</p> <p>Community of practice and toolbox for destination management by 2023</p>

Commission action: The Commission has completed a study collecting transferable digital tools and practices for tourism actors, and published in 2023 [a searchable inventory](#), which is regularly updated with the information from stakeholders. The aim is to provide SMEs and destinations with an array of readily available digital tools and practices. The Commission also funded a 2022 study on [smart tourism destinations](#) to help destinations build capacity to implement digitally smart tourism solutions. Outputs include a toolbox for data management in destinations published in October 2023. With the support of the European Parliament, the Commission launched in 2023 a pilot project on [EU Competence Centre for data management](#) in tourism destinations (D3HUB).

The Commission works towards the [Digital Decade policy targets](#), such as 90% of all SMEs having at least basic digital intensity (using at least four technologies) and follows them through the [DESI dashboard](#). SMEs, including tourism enterprises, have received digitalisation support through [Enterprise Europe Network](#) and [European Digital Innovation Hubs](#) and calls through Single Market Programme.

Member State action: A total of 12 Member States consider it a priority to support the digital transition of SMEs as a priority and all 12 have put in place measures to address the issue. There are

Member State example: Finland

“Visit Finland provides several services for supporting digitalisation of tourism SMEs; Visit Finland Data Hub as an inventory of tourism services, reports (e.g. how to choose the most appropriate digital sales channels and booking system) and training (e.g. a bootcamp in filling in the tourism services into different sales channels) and pilots in testing the advances technologies like AI in developing the tourism services and the back office functions of SMEs.
<https://www.visitfinland.fi/liiketoiminnan-kehittaminen/digitaalisuus>”

4 Member States that [shared their practices](#) in their TAC reports, while 3 (Austria, Estonia, and Slovakia) have presented pledges on the topic.

Stakeholder action: key figures for transition pathway topic 16

27 pledges	14 Member States	11 organisation types	48% completed / with results
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Concrete actions by stakeholders depend on their role, and include:

- business associations and international organisation providing training courses and programmes on the digitalisation of tourism SMEs, often with a target number of SMEs to be reached;
- SMEs providing services to help digitalise tourism destinations, assess the digitalisation needs of businesses and providing user-friendly ways of entering the digital realm by creating online tourism guides;
- large companies using digital tools internally and making these tools available to their partners and collaborating SMEs to help them with service provision and management;
- DMOs setting concrete digitalisation targets for their stakeholders, providing toolboxes and regularly monitoring the results (see example box below).

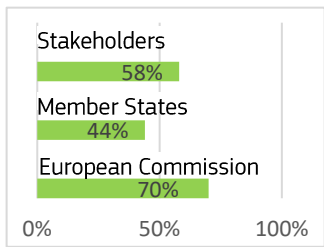
Example pledge with [reported progress](#) by Visit Värmland

“Continue to share digital skills and knowledge through workshops and Visit Värmland’s “toolbox” available at our website [visitvarmland.com](#). We do not work directly with booking, just with sharing and increasing digital competence for SMEs.

Targets: By year 2025, 100% of active stakeholders have an easy to use website, with online booking options and are in control of their own accounts at, e.g. Google my business, tripadvisor, social media.

Share the “online inventory of transferable tools and practises” with local stakeholders.

Keep updated on the “Visit Värmland’s Toolbox for data management in destinations” by evaluating the results at least yearly bur more prefereably once a three months.”

Progress indicators for topic 16 by 2023 based on reported efforts	Change indicator: Share of accommodation and food enterprises having at least basic digital intensity	
 <p>Stakeholders: 58%</p> <p>Member States: 44%</p> <p>European Commission: 70%</p>	Base value in 2022	53.2% (100% - 46.8% of companies with very low level based on Eurostat)
	Expected for 2025	70% (in line with the Digital Decade target of 90% of SMEs having at least basic digital intensity by 2030)
	Source	Eurostat table isoc_e_diin2

2.4. Resilience and inclusion

Resilience in tourism encompasses both the capacity to recover from sudden shocks and the ability to adapt approaches so as to effectively respond to long-term challenges. Figure 7 shows the [EU Tourism Dashboard](#) index on socio-economic resilience indicators. ⁽⁸⁾

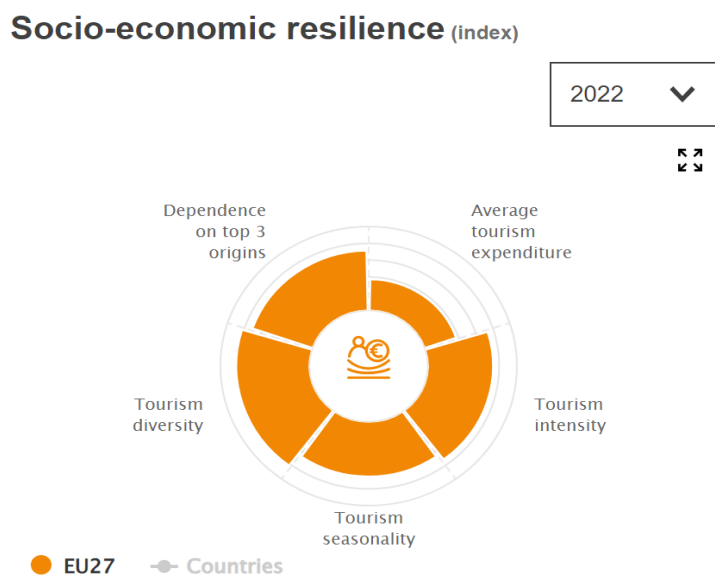


Figure 7: Socio-economic resilience index ([EU Tourism Dashboard](#))

DG GROW’s ecosystem [confidence indicator](#) demonstrated the vulnerability of the tourism ecosystem during COVID-19, when it plummeted to the bottom of all ecosystems. Since the publication of the transition pathway, the tourism ecosystem (red line) has risen back into the top 3 and remains there since September 2022, showing already improved resilience.

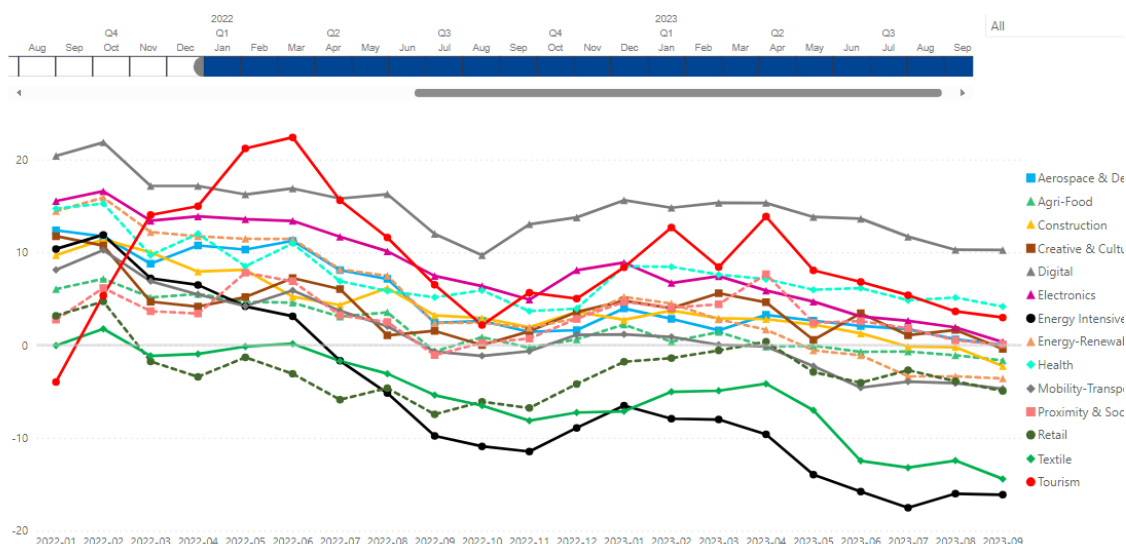


Figure 8: GROW confidence indicator 2022-2023, tourism in red colour

⁽⁸⁾ To be kept in mind, EU or national averages can hide important regional differences, so the Dashboard users are advised to explore indicators at regional levels when available

2.4.1. Seamless cross-border travel

Topic 17 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Digitalising of Schengen visa procedures for non-EU nationals Digitalising travel documents for EU citizens for improved and faster border processes	The Commission will presents two proposals: (i) a proposal for a Regulation on the digitalisation of the visa procedures in 2022 (ii) a proposal for a Regulation on the digitalisation of travel documents and facilitation of travel in 2023
EU Agenda 2030 invites Member States to:	
facilitate the digital transition in tourism and support the tourism industry and sustainable management of destinations, in particular by: ... in cooperation with the Commission, deploying efforts aimed at digitalising travel documents, in accordance with the competences of Member States	

Although the [EU represents only 5.6% of the world's population and 3.0% of the world's land area, it received 45.8% of all international tourism arrivals in the world in 2022](#) ⁽⁹⁾. To maintain the competitiveness and attractiveness of EU tourism, efficient and convenient travel procedures play an important role. While efficient mechanisms are already in place, discussions under the co-creation process recognised that certain areas could be further developed, especially with the help of digitalisation.

Commission action: The Commission published a [proposal on the digitalisation of the Schengen visa procedure](#) ⁽¹⁰⁾ in April 2022, which aims to:

- replace the visa sticker and make it possible to submit visa applications online through a European online visa platform;
- improve the visa application process;
- reduce the costs and burden on EU countries, as well as on applicants.

The Commission is also preparing a legislative proposal on the digitalisation of travel documents and facilitation of travel, on which a [public consultation](#) was held until June 2023. To inform the impact assessment, the Commission organised [a special Eurobarometer](#) to explore public opinion. This found that 68% of Europeans favour the use of digital travel documents for extra-Schengen travel and 66% would prefer a single EU-level application for the use of digital travel documents, rather than one for each country.

While visa-free movement in the EU brings significant benefits for tourism and travel in the EU, it can also result in greater irregular migration by nationals from visa-free non-EU countries through overstays or through asylum applications. To help guard against this, the Commission presented a [proposal to revise the visa suspension mechanism](#) ⁽¹¹⁾ in October 2023.

⁽⁹⁾ Tourism arrivals data based on [Global and regional tourism performance \(unwto.org\)](#)

⁽¹⁰⁾ [EUR-Lex - 52022PC0658 - EN - EUR-Lex \(europa.eu\)](#), procedure [2022/0132/COD](#)

⁽¹¹⁾ [EUR-Lex - 52023PC0642 - EN - EUR-Lex \(europa.eu\)](#), procedure [2023/0371/COD](#)

Member State action: While 5 Member States consider digitalisation of travel documents and procedures a priority, 7 have taken specific measures in this area. However, no Member States have shared their practices in their TAC reports or made pledges on the topic.

Stakeholder action: Key figures for transition pathway topic 17 pledges



Concrete actions by stakeholders depend on their operating contexts, activities and objectives. They include:

- support from a large company for a seamless cross-border travel experience thanks to the effective management of digital travel documents (see example box below);
- action by a trade union to address developing cross-border multimodal ticketing approaches and support cross-border transport workers;
- an SME taking the investor perspective to explore and support innovative ideas for seamless travel solutions.

Example pledge with reported progress by Amadeus

Amadeus has developed a solution, 'Traveler ID', which is an aggregator of certified identities and health wallets that can be used all along the travelers' journey to verify their identity and their document compliance with regulations in place.

Amadeus Traveler ID digitalizes all the documents and will be even more powerful when the legislation will allow biometrics recognition at the different touch points of the traveler journey.

Traveler ID is already used by many airlines and our wish by 2030 is to extend its use at every touchpoint of the traveler journey (online check-in, airport and border controls, boarding, hotel check-in)

Progress indicators for topic 17 by 2023 based on reported efforts	Change indicator: Number of nights spent by non-EU residents in EU accommodation establishments							
<table border="1"> <tr> <td>Stakeholders</td> <td>19%</td> </tr> <tr> <td>Member States</td> <td>26%</td> </tr> <tr> <td>European Commission</td> <td>40%</td> </tr> </table>	Stakeholders	19%	Member States	26%	European Commission	40%	Base value in 2022	418 million extra-EU visitor nights (calculation: visitors from any country – intra-EU)
	Stakeholders	19%						
	Member States	26%						
European Commission	40%							
Expected for 2025	700 million extra-EU visitor nights (return to 2019 level)							
Source	Eurostat table tour_occ_ninraw							

2.4.2. Coordinated information on travel restrictions

Topic 18 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Implementing and extending the EU DCC framework as needed	Up-to-date effectively working EU DCC framework
EU Member States to provide up-to-date information on their travel rules via 'Re-Open EU'	Up-to-date 'Re-Open EU'
Drawing lessons from COVID-19 to better respond to future exceptional events	Study results on the lessons learnt from COVID-19 by 2023
EU Agenda 2030 invites Member States to:	
facilitate the digital transition in tourism and support the tourism industry and sustainable management of destinations, in particular by: ... providing the necessary data to the Commission on travel information, including for the Re-open EU platform	

When the transition pathway for tourism was developed, COVID-19-related restrictions were still in place, and all stakeholders were very much aware of how they affected travel within the EU. Therefore, the coordinated sharing of information on travel restrictions within the EU was included as an action in both the transition pathway and the EU Agenda for Tourism 2030. The objective was to guarantee business continuity in the tourism ecosystem with support operations as long as needed and to draw lessons to ensure better resilience in the future.

Commission action: The [EU Digital COVID-19 Certificate](#) (EU DCC) Regulation entered into application on 1 July 2021 and was extended in June 2022 until 30 June 2023 to allow travellers to continue to use their certificate if necessary. After all Member States had lifted intra-EU travel restrictions, and the [World Health Organization \(WHO\) declared](#) that COVID-19 was no longer a public health emergency of international concern, there was no reason for a further extension and the Regulation officially expired in July 2023 ⁽¹²⁾.

While the Regulation was in force, the 27 Member States issued more than 2 billion EU Digital COVID-19 certificates, and 51 non-EU countries and territories across 5 continents joined the system. The fact that the Global Digital Health Certification Network, launched by the World Health Organization, is based on the EU Digital COVID Certificate technology is a testament to its effectiveness. This global certification network was supported by the Commission at technical level as part of a landmark digital health partnership.

The [Re-Open EU](#) web platform and mobile app shared accurate and user-friendly information on COVID-19-related travel restrictions within the EU. During its operation, it had over 45.6 million visits to the web platform, and nearly 4 million mobile app downloads, making it the most downloaded mobile app developed by the EU. The Re-Open EU service was closed when the EU DCC Regulation expired at end of June 2023.

The Commission launched [a pilot project initiated by the European Parliament on crisis management and governance in tourism](#) in 2022. It will deliver educational material on the

⁽¹²⁾ [Key documents related to the Digital COVID-19 Certificate \(europa.eu\)](#)

lessons learnt from the COVID-19 pandemic and other crises affecting tourism in 2024. The aim is to help tourism destinations develop resilience and crisis governance.

Member State action: As Member States had already lifted all intra-EU travel restrictions in August 2022, they were not included in the TAC reporting collected in 2023. There are also no pledges on the topic from Member State administrations.

Stakeholder action: key figures for transition pathway topic 18 pledges



This action topic of the transition pathway was exceptional in the sense that it focused the specific task of ensuring that the Commission coordinates sharing of travel restrictions information received from the Member States. However, there are also two tourism stakeholder pledges which aim at supporting management of travel-related information, inspired by this topic:

- a national DMO establishing a system that can be launched quickly to inform international visitors in case of a crisis;
- a local administration monitoring tourist traffic monitoring by means of live heat maps. Such tools could potentially be used for crisis management as well as for destination management in normal circumstances.

Example pledge with reported results by Netherlands Board of Tourism

“A protocol has been drawn up as part of crisis management to inform international visitors through the national platform Holland.com and the corresponding social channels (managed by NBTC) about the current state of affairs and applicable measures. Therefore a special online information desk is developed which will be relaunched within 24 hours in case of emergencies.”

Progress indicators for topic 18 by 2023 based on reported efforts	Change indicator: Published educational material for crisis resilience including lessons learnt from COVID-19 measures and governance					
<table border="1"> <tr> <td>Stakeholders</td> <td>20%</td> </tr> <tr> <td>European Commission</td> <td>80%</td> </tr> </table>	Stakeholders	20%	European Commission	80%	Base value in 2022	No
	Stakeholders	20%				
	European Commission	80%				
Expected for 2025	Yes					
Source	DG GROW website and T4T online stakeholder support platform					

2.4.3. Fairness and equality in tourism jobs

Topic 24 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Tourism companies to offer stable and decent employment, with fair and equal pay, full social security coverage, respect of workers' rights to organise and to bargain collectively, working contracts and gender equality</p> <p>Public tourism organisations to lead by example in employing fair employment practices</p> <p>Competent authorities to carry out inspections and controls on working conditions in the sector</p>	<p>Reported approaches to support gender equality, fair pay and working conditions in tourism, in line with reporting obligations on environmental and social sustainability</p>
EU Agenda 2030 invites Member States to:	
<p>facilitate the digital transition in tourism and support the tourism industry and sustainable management of destinations, in particular by: striving for fairness, equality and social inclusion in tourism jobs, paying attention to, in particular, the attractiveness of quality employment in the tourism sector and the particular needs of seasonal workers</p>	

Commission action: Since January 2023, the [Directive on corporate sustainability reporting \(CSRD\)](#) requires large companies and listed SMEs to report on sustainability. This includes information on equal treatment and opportunities for all (including gender, pay equality, inclusion of people with disabilities, measures against violence and harassment) and working conditions (work security, decent hours and wages, right to dialogue, work-life balance, and health and safety). The [Directive on improving gender balance among directors of listed companies](#) entered into force in 2022 and tourism companies should comply with it.

The Commission has set up the [EURES portal](#) as a one-stop-shop for job vacancies and job searches and in November 2023 it adopted a legislative proposal on [establishing an EU talent pool](#) to address labour shortages. Waiters and cooks are included in the list of occupations with staff shortages and the proposals for a [Recommendation on qualifications of third-country nationals](#) and a [Recommendation for a learning mobility framework](#) aim to meet the demand for skilled staff.

Member State action: A total of 13 Member States consider it a priority to support fair, decent and attractive tourism jobs, 6 have put in place measures to that end, and 2 have [shared their practices](#) in their TAC reports.

Member State example: Ireland

“Fáilte Ireland launched the Employer Excellence programme in September 2022 to help participating businesses to improve their employer practices, and enhance their reputation as excellent employers.

Of the circa 20 000 employees surveyed as part of the Employer Excellence Programme to date, 79% are proud to recommend their workplace to others. Key insights gathered from the first phase of employee surveys were presented to participating businesses in May.

Fáilte Ireland continues to update its recruitment toolkit which has been downloaded by thousands of tourism businesses nationwide. The 2023 version now includes key information for those businesses seeking to recruit international talent, as well as providing key tips to accessing the best local talent.“

<https://supports.failteireland.ie/tourismcareerstoolkit>

<https://supports.failteireland.ie/international-recruitment-guide>

Stakeholder action: key figures for transition pathway topic 24 pledges



Concrete actions by stakeholders include:

- trade unions defending workers’ rights, including women and minorities, and developing action plans with concrete measures to fight labour shortage;
- one SME committing to creating flexible jobs that respect fundamental rights, and another SME guaranteeing decent and good quality jobs in their company and their partner companies;
- a regional administration investing to reduce recognised health risks in hospitality sector services, which will also improve gender equality in terms of work and well-being (see example box below).

Example pledge by the Government de les Illes Balears

“The new Tourism Act defends the idea that to be sustainable, our economic system need to take into account not only environment concerns: sustainability also applies to society and economy as a whole. With this in mind, the law points to correct a situation between one of its most punished collectives. The room service workers in the hospitality sector are the most suffered collective in Hostelry, as they represent the 27% of the accident rate in the whole tourism sector. Additionally, this collective is strongly feminized, with almost no men among them. Most of their injuries are musculoskeletal disorders associated with overexertions. Correcting this situation will represent a measure of social justice for the part of labour, but also for the part of gender equality.

In this context, our Labour Health Institute (IBASSAL) made a study in collaboration with a big hostelry company to evaluate the potential benefit for room service workers of the installation of lifting mechanisms in hostelry's beds. In this study, the entities conclude that this technology has the potential to reduce the effort 8'4 times if the bed is individual and 7'3 times if the bed si for couples. With this knowledge the Balearic Government introduced the obligation to install lifting mechanisms in the 100% of the beds in the sector. This substitution can be distributed along all the transition period (2022-2027).

The Government is supporting the sector by financing the purchase of these mechansims with EU NextGen funds.

The measurable target is to achieve the 100% of hospitality beds to have lifting mechanisms by 2027.”

Progress indicators for topic 24 by 2023 based on reported efforts	Change indicator: Shares of men and women of the part-time workforce in selected tourism industries							
<table border="1"> <tr> <td>Stakeholders</td> <td>36%</td> </tr> <tr> <td>Member States</td> <td>22%</td> </tr> <tr> <td>European Commission</td> <td>50%</td> </tr> </table>	Stakeholders	36%	Member States	22%	European Commission	50%	Base value in Q4-2022	Men 27.2% ; Women 72.8%
	Stakeholders	36%						
	Member States	22%						
European Commission	50%							
Expected for Q4-2025	Men 36% Women 64% (progressing towards equal balance 50%/50% by 2030)							
Source	Eurostat table tour_lfsq6r2							

2.4.4. Access for all for tourism

Topic 25 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Raising awareness of the importance of accessibility in tourism Improving the supply and visibility of accessible tourism services	Increased offer and online access to information on accessible tourism services
EU Agenda 2030: Actions	Expected outputs
The Commission, Member States other relevant public authorities and DMOs to raise awareness of the importance of accessibility in tourism with a view to improving the accessibility of, and creating favourable conditions for, accessible tourism services	Increased offer of accessible tourism services

In 2022, [27% of the EU population experienced self-perceived long-standing limitations in usual activities due to health problems](#) and over [one fifth \(21.1%\) of the EU population was aged 65 and over](#). Both are significant customer groups for EU tourism competitiveness and fairness. In 2022, [61.7% of citizens spent at least one night outside of their normal residence for personal reasons](#). Of those who did not travel that year, for 38.6% of 15-24 year-olds this was due to financial reasons, and for 32.4% of people persons over 65 it was due to health reasons.⁽¹³⁾

Commission action: In line with the [strategy for the rights of persons with disabilities for 2021-2030](#) the Commission proposed [European Disability Card as well as the enhancement of the European Parking Card for persons with disabilities](#) in September 2023. These will make it easier for people with disabilities to travel across the EU. The annual [Access City awards](#) and [Smart Tourism Capital](#) awards have continued to promote accessibility as an important value for places to visit and live, and to expand the EU network of accessible destinations.

Member State action: A total of 11 Member States consider it a priority to boost the provision of accessible tourism services and increase awareness in this area and 13 have introduced specific measures to address this. Moreover, 7 Member States have introduced measures on using accessible public procurement in tourism-related services, while 5 [shared their practices](#) in their TAC reports.

Member State example: Portugal

“The +Sustainable Tourism Plan 2020-23 specifically addresses "Accessibility for All" as «one the priorities of tourism activity insofar as only an inclusive supply, accessible to all, makes it possible to achieve the pillar of social sustainability, in addition to strengthening the competitiveness of businesses and tourist destinations». This Plan defines key actions like: a capacity building programme for professionals ("All for All Programme"); the definition of accessibility criteria for the attribution of support under the financing programs from Turismo de Portugal; and the creation of an "Accessible Beach Award", among other actions.”

<https://business.turismodeportugal.pt/SiteCollectionDocuments/sustentabilidade/sustainable-tourism-plan-2020-2023-turismo-de-portugal.pdf>

⁽¹³⁾ [Persons not participating in tourism by reason and age group](#)

Stakeholder action: key figures for transition pathway topic 25 pledges

14 pledges	7 Member States	8 organisation types	71% completed / with results
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Concrete actions set out in stakeholder pledges include:

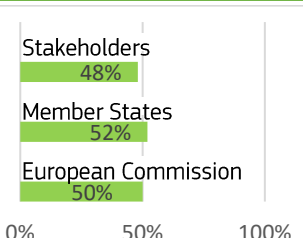
- DMOs including accessibility in their strategies and actions, providing certifications, sharing best practice and setting concrete objectives in accessibility improvements;
- NGOs setting up groups dedicated to sharing best practice, organising events and producing outputs on accessibility in tourism in general as well as in specific types of tourism (such as cycling tourism);
- an SME committing to improve its accessibility (see example box below) and another SME providing services to help destinations and companies assess and improve their accessibility;
- a local administration developing an accessibility guidance map that flags obstacles and disturbances on the road for people with disabilities and benefits both residents and visitors in the city.

Example pledge with reported progress by House Himmelfahrt

“Our House Himmelfahrt builds on three pillars: tradition (vacation since 460 years), sustainability (360 degree SDG orientation) and accessibility (36 measures to guarantee full accessibility).

In order to implement the objective of providing accessible tourism services we commit to the following three actions:

- by June 2023: revitalise our structure and thereby realising full-fledged accessibility by design. The revitalisation will build on the EU strategy for the rights of persons with disabilities (2021-2030) and aim at showcasing how accessibility and tourism are synergetic twins rather than foes;
- by July 2023: implement 36 measures aiming at fostering accessibility. These measures will guarantee that not only the structure itself but also bathrooms, kitchens, bedrooms etc take the needs of persons with reduced mobility fully into account;
- by August 2023: turn from hardware to software and publish our access-strategy on our website and promote accessible tourism amongst local actors but also - via online tools - at international level. The ambition is to showcase that fully accessible tourism is possible without having to compromise in design and without the risk of losing attractivity amongst persons who are not dependent on fully accessible destinations.”

Progress indicators for topic 25 by 2023 based on reported efforts	Change indicator: Share of EU citizens not participating in tourism (at least one overnight stay) for financial or health reasons	
	Base value in 2022	15.3% not participating for financial reasons, 8.0% for health reasons
	Expected for 2025	Reducing share of both non-participation reasons
	Source	Eurostat table tour_dem_npage

2.4.5. Diversification of tourism services and well-being of communities

Topic 26 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Diversifying and developing tourism services so that they benefit both residents and visitors</p> <p>Taking into account different types of customers, such as families or individuals, or people with different religious, spiritual or sexual orientations</p>	<p>Increased variety and diversity of tourism offer which also supports links between residents and visitors, and authentic tourism experiences linked with the local culture</p>
EU Agenda 2030: Actions	Expected outputs
<p>The Commission and Member States and other relevant public authorities to provide various forms of support to help destinations, companies and start-ups diversify tourism services, particularly across seasons and various locations</p> <p>The Commission and Member States and other relevant public authorities to provide various forms of support to help companies, start-ups and local communities innovate with sustainable and resilient tourism services, with a positive net impact for residents and local ways of life</p>	<p>More resilient services and destinations, which can better resist shocks</p> <p>Innovative tourism services to meet new types of tourism demand while respecting the long-term sustainability needs of residents and the environment</p>

Commission action: Agricultural, maritime, cohesion and research & innovation policies all support tourism as one means of innovative, sustainable and resilient development of rural regions under several EU funding instruments. In 2022, a new [Urban Agenda thematic partnership was launched on sustainable tourism](#). The partnership will develop an action plan focused on specific issues in cities, supporting sustainable development and finding a balance between economic, social, cultural, and environmental sustainability of tourism. Sustainable tourism was one of the three topics of the 2023 [call for proposals of the European Urban Initiative-Innovative Actions](#), with an overall indicative budget of EUR 120 million from the European Regional Development Fund (ERDF) to co-finance the testing and transfer of urban innovative solutions.

A Single Market Programme [call of EU 20 million](#) with a budgetary top-up support from the European Parliament was launched in September 2022 to support SMEs in building sustainable growth and resilience. To guide stakeholders, in October 2022 the Commission published the [results of a study on the challenges and solutions for unbalanced tourism growth at destination level](#).

Member State action: Supporting the development of tourism services that respect the well-being of residents was considered a priority of 17 Member States, the highest number across all reported EU Agenda 2030 action areas. Of these Member States, 9 have concrete measures in place to address the issue. Moreover, 14 Member States consider it a priority to diversify service provision across seasons and customer groups, and 12 have introduced measures in that area. However, only 5 Member States [shared concrete practices](#) in their TAC reports. In the [Palma Declaration](#) of 2023, the Member States highlighted the importance of social sustainability to tourism, including both the accessibility of tourism for

all, and the net benefits from tourism for the long-term well-being of both visitors and local residents.

Member State example: Austria

“The national tourism strategy “Plan T – Masterplan Tourism” defines as one of its nine key aspects: “Designing tourism in a way that allows for the harmonious co-existence of both guests and the local population”. More information:
<https://www.bmaw.gv.at/en/Topics/tourism/plan-t.html>

One of the most important indicators for the need for action in this regard is the measurement of tourism acceptance within the Austrian population. This was measured for the first time in January 2020. It was repeated in 2021 and 2022 over the course of the year by means of a representative study of over 2,000 persons between 15 and 75 years of age. Questions relate to the personal opinion and impression of tourism as well as the personal identification with tourism and an estimation of the importance of tourism for Austria. From this data, an index on tourism acceptance was calculated (2021: 78 out of 100, 2022: will be presented in May 2023). The measurement will be continued for the year 2023. More information:
<https://www.bmaw.gv.at/Themen/Tourismus/tourismuspolitische-themen/nachhaltige-entwicklung/tourismusakzeptanz.html>”

Stakeholder action: key figures for transition pathway topic 26 pledges



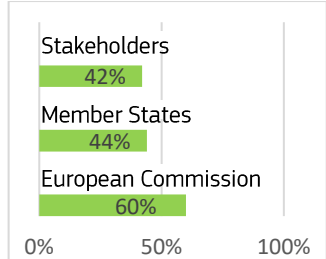
Concrete actions by stakeholders depend on their role and include:

- large companies providing services for diversified customer groups, providing specific types of tourism resources, and collaborating with local partners to develop certified sustainable local services at destinations;
- DMOs involving residents in tourism planning and monitoring, helping tourism to become a benefit rather than a nuisance for local residents (see example box below);
- local authorities working towards creating a more well-rounded and immersive tourism experience for visitors, whether through diversified services or by redirecting tourists out of the hot spots;
- a tourist organisation sharing its successful approach of developing a tourism programme together with a small destination community with other small towns, to help them become sustainable destinations that are co-planned with residents;
- an international network of organisations developing indicators and data collection on the impact of tourism services and products for visitors and residents;
- an NGO promoting authentic activities for different groups targeting both locals and visitors and facilitating tourism activities linked to local people and contributing to better understanding of their customs and traditions.

Example pledge with reported progress by Visit Flanders

“Goals: The share of residents indicating that an increasing number of tourists are reducing the liveability of art cities and regions remains below 25%. The share of the top three months in total overnight stays does not exceed 40%. At least 40% of residents of the art cities indicate that they have a say in ideas about tourism developments in the city. 90% of Visit Flanders' contacts in the tourism sector are familiar with the Travel to Tomorrow Vision and 75% of this group agree with the vision.

Actions: In our product development and communication, we focus on distributing visitors in time and space via our themes. We work with partners to monitor and safeguard an area’s liveability. We continue to work on expanding support for the Travel to Tomorrow vision and sustainable entrepreneurship in the tourism sector, including through the Travel to Tomorrow Academy. We look at how we assess liveability within the context of tourism in the ambassador study.”

Progress indicators for topic 26 by 2023 based on reported efforts	Change indicator: Tourism seasonality (proportion of nights in 3 busiest months of all tourism nights in a year)									
 <table border="1"> <caption>Progress indicators for topic 26 by 2023 based on reported efforts</caption> <thead> <tr> <th>Entity</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Stakeholders</td> <td>42%</td> </tr> <tr> <td>Member States</td> <td>44%</td> </tr> <tr> <td>European Commission</td> <td>60%</td> </tr> </tbody> </table>	Entity	Percentage	Stakeholders	42%	Member States	44%	European Commission	60%	Base value in 2022	45%
Entity	Percentage									
Stakeholders	42%									
Member States	44%									
European Commission	60%									
	Expected for 2025	40% (lower value means more equally balanced tourism nights in all months)								
	Source	EU Tourism Dashboard indicator tourism seasonality								

To develop indicators and follow progress on this topic, focus should not be placed on EU or national values alone, as they may hide significant regional differences. It is suggested instead that destinations explore EU Tourism Dashboard resilience indicators, such as [tourism intensity](#), at smaller regional levels. Many indicators are available in the [EU Tourism Dashboard](#) at several granularities following the [NUTS classification](#):

- NUTS 1: major socio-economic regions (92 regions based on NUTS 2021)
- NUTS 2: basic regions (242 regions based on NUTS 2021)
- NUTS 3: small regions (1166 regions based on NUTS 2021)

2.5. Skills and support for transition

The [EMI Tourism report](#) analysed demand for digital and green skills in tourism-related job advertisements online. It found that the most requested digital skills were computer programming and database management, and the most requested green skills related to sustainable transportation and waste management in 2022. Based on an analysis of the profiles of professionals registered on LinkedIn and employed in the tourism industrial ecosystem, the [EMI Tourism report](#) concluded that only 15.4% had moderate digital skills, and 2% had advanced digital skills. Moreover, 1.8% claimed to have one type of green skill. Figure 9 demonstrates how this is well below the demand for these skills in the online job advertisements analysed by the [EMI Tourism report](#).



Figure 9: Share of online tourism job advertisements demanding digital and green skills in 2023 ([EMI Tourism report](#))

Tourism companies are recognising that in addition to hiring people with new skills, they need to develop the skills of their existing employees. **Error! Reference source not found.** Figure 10 demonstrates how in 2022, on average 9.9% of businesses in the categories Accommodation and food services and Travel agency services provided digital skills training to their personnel, with the proportion reaching over 20% in Finland, Poland, Norway and Cyprus.

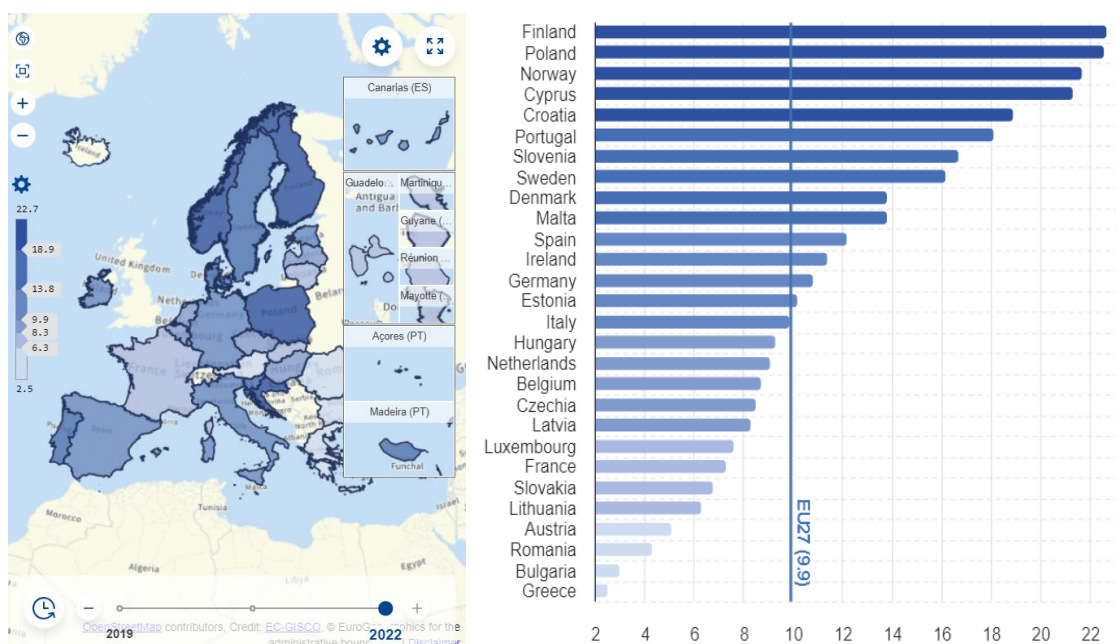


Figure 10: Tourism personnel training on ICT skills ([EU Tourism Dashboard](#))

2.5.1. Awareness raising on skills needs for twin transition

Topic 19 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
Preparing information materials on skills needs for different types of tourism actors	Information brochure published in 2022
EU Agenda 2030 invites Member States to:	
... organise awareness-raising activities on such themes as the benefits of the green and digital transformation, demand for sustainable offers, new skills needs and experimenting in tourism	

To adapt to changes in tourism demand, tourism workers, companies and education and training providers have to be aware of the new skillsets that are needed. Although the initial objective for this action has been reached ([published information materials and tools on skills intelligence](#)), further work is needed to support the reskilling and upskilling of the tourism workforce to reach the [Pact for Skills target of training 10% of tourism workforce each year](#).

Commission action: The Commission co-funded the [Next Tourism General Alliance \(NTG\) project](#) 2018-2021, which provided resources on tourism skills, including the Blueprint strategy and action plan. In 2022, it provided funding to [PANTOUR](#) as a follow-up project to address skills needs in the tourism ecosystem. Tools being developed by PANTOUR include the Sectoral Skills Intelligence Monitor, the Skills Lab, resource books for trainers, and a Skills strategy plan for 2026-2036.

CEDEFOP provides [a skills intelligence tool](#) for several business sectors, including Accommodation and food, and Arts, recreation and other. The tool allows users to explore sectoral skills and employment profiles, as well as projections of future needs.

Member State action: While this specific aspect of awareness raising was not included in the TAC reporting, the overall awareness raising on the twin transition was covered and is reported under the next topic 20 (Section 2.5.2). Estonia is addressing awareness of skills needs, however, and has presented its activity in the form of a pledge.

Member State example: Estonia

Estonian Ministry of Economic Affairs and Communication is procuring a study on tourism sector skills and workforce to be conducted by the end of 2022. The general objectives of the study are:

- (a) an analysis of the skills and competences profile and the number of workers needed in the tourism sector short-term, after recovery from the crisis and in long-term, to execute green, digital and innovation transition in Estonian tourism sector,
- (b) proposals of interventions for policy makers and the sector to provide the tourism sector with sufficient workforce with adequate skills and reduce labor turnover.

Ministries of economics, education, social affairs and internal affairs are in holding a dialogue to find solutions for the tourism sector, which is suffering from severe labor shortages.

Stakeholder action: key figures for transition pathway topic 19

6 pledges	5 Member States	3 organisation types	67% completed / with results
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Concrete actions by stakeholders depend on their operating contexts and objectives, including. They include:

- efforts by several business associations to bridge the gap between the industry, necessary knowledge on the skills, and potential users by providing online courses, giving presentations, and sharing best practices (see example boxes below);
- an SME aiming to set up and participate in collaborative projects to raise awareness on twin transition skills needs across countries and different types of tourism organisations.

Example pledge with reported progress by Federturismo Confindustria

“Federturismo Confindustria is the lead partner of the NEXT TOURISM GENERATION ALLIANCE, in charge of implementing the NTG project, co-financed by the European Commission under the Erasmus+ programme.

... [pledge shortened]...

Based on the results achieved through the NTG project, Federturismo Confindustria's concrete pledge is to promote awareness of transition needs and sharing of best practices among its members with the goal of having reached each member for active knowledge exchange at least 3 times a year until 2025 and beyond.”

Example pledge with reported progress by European Boating Industry

“Within the framework of the EnviroNaut project, the EBI has collaborated in the development of a questionnaire for stakeholders in the nautical tourism sector that will allow us to have knowledge of the skills demanded by the industry, which we will later make available to the public through our website and the free online course that we are developing and that will be available in January 2024.

We are currently (July 2022) in the process of disseminating the questionnaire with which we intend to reach as many interested parties as possible.”

Furthermore, several collaborative projects are being implemented under [Erasmus+](#) to develop tourism training approaches, and to raise awareness about the needs and new approaches for tourism-related trainings.

Progress indicators for topic 19 by 2023 based on reported efforts	Change indicator: Participation of tourism workforce in upskilling or reskilling activities	
<p>A bar chart with a horizontal axis from 0% to 100%. Two bars are shown: 'Stakeholders' at 33% and 'European Commission' at 40%.</p>	Base value in 2022	56 000
	Expected for 2025	120 000 (10% of the workforce in tourism industries – 12.1 million in 2022)
	Source	DG EMPL Pact for Skills annual survey report

2.5.2. Awareness raising on changes in tourism demand and opportunities offered by the twin transition

Topic 20 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Dissemination campaign on the tourism transition pathway to destination authorities, tourism management organisations and SMEs to promote the relevance of the actions linked with the twin transition and resilience</p> <p>Awareness-raising activities to increase the uptake and visibility of sustainability tools, as well as consumers' demand of sustainable options</p> <p>Supporting networking and best practice sharing by award-winning cities in Europe on smart tourism, culture, sustainability, innovation, accessibility and European heritage</p>	<p>Dissemination activities on the tourism transition pathway in 2022</p> <p>Incorporation of information on sustainability schemes and labels in the EU supported tourism campaigns</p> <p>Best practice exchange and promotion events between award-winning cities</p>
EU Agenda 2030: Actions	Expected outputs
<p>The Commission, Member States and other relevant public authorities and DMOs to organise awareness-raising activities for tourism stakeholders.</p> <p>Support networking and best-practice sharing by award-winning cities in the EU on smart tourism, culture and heritage, sustainability, innovation, and accessibility</p>	<p>Dissemination of tourism transition pathway in 2022</p> <p>Awareness-raising on digital and green transition as well as resilience</p> <p>European Enterprise Network advisory services to support tourism SMEs</p> <p>best-practice exchange and promotion of events</p>

Commission action: The Commission has promoted the transition pathway through its tourism webpage, stakeholder emailing, social media channels and numerous presentations by DG GROW's tourism team at various stakeholder events, with at least 1 presentation/communication activity a week, on average. The Commission also highlighted the transition pathway areas during the annual European Tourism Forum events co-organised with the EU presidency countries. Furthermore, it designed the programme of the [European Tourism Day 2023](#) flagship event around the key dimensions of twin transition and resilience. Since 2022, the Commission has organised [open tourism stakeholder events twice a year](#) to share examples and best practices on making concrete pledges.

Promotion of [annual Smart Tourism Capitals and Green pioneer awards](#) contribute to awareness raising on transition pathway areas of action, as well as annual [Access City](#) award, [Capitals of culture](#), [European Heritage awards](#) and [Green Capital & Green Leaf](#) awards.

For awareness raising and advice at practical level, the [Enterprise Europe Network](#) and especially its tourism sector group set up in 2022 advises tourism SMEs in improving their competitiveness through twin transition and resilience building, including with the support

Member State example: Greece

The Ministry regularly informs the national tourism stakeholders on the latest developments regarding the European Agenda for Tourism 2030 and the Tourism Transition Pathway through sending emails and inviting them to join to the co-implementation process by assuming of pledges or commitments.

of sustainability tools. The Commission finances communication campaigns with the European Travel Commission to support the visibility and demand for sustainable tourism in the EU.

Member State action: A total of 10 Member States have introduced measures to disseminate information about the transition pathway and the EU Agenda 2030, and 9 support the sharing of best practices between stakeholders. Moreover, 7 Member States have [shared best practices](#) through their TAC reports, while 2 (Estonia and Finland) have also presented pledges on this topic.

Stakeholder action: key figures for transition pathway topic 20 pledges



Concrete actions by stakeholders include:

- NGOs raising awareness at conferences and forums, and through dissemination campaigns and newsletters on their specific tourism-related focus areas (see example box below);
- a free awareness-raising programme on sustainable tourism run by a network of destination organisations, with concrete targets on the number of participating tourism professionals and training sessions;
- a regional DMO organising sustainability forums twice a year to support their stakeholders in networking and sharing best practices;
- an international organisation developing series of podcasts on issues relating to the transition of the tourism industry.

Example pledge by EGWA

“EGWA commits to campaign on the opportunities of twin transition for tourism by producing and disseminating at least 2 News/Year from 2022 until 2025 (on-going), encouraging stakeholders linked to greenways (destination authorities, tourism management organisations and SMEs) to take an active role in the transition pathway.”

Progress indicators for topic 20 by 2023 based on reported efforts	Change indicator: Number of participants in the open stakeholder events informing about the transition pathway							
<table border="1"> <tr> <td>Stakeholders</td> <td>35%</td> </tr> <tr> <td>Member States</td> <td>48%</td> </tr> <tr> <td>European Commission</td> <td>60%</td> </tr> </table>	Stakeholders	35%	Member States	48%	European Commission	60%	Base value in 2022	304 people (first year), 1415 in 2023
	Stakeholders	35%						
	Member States	48%						
European Commission	60%							
Expected for 2025	2000 (several events organised by the Commission including European Tourism Day and monthly webinars on the T4T online platform)							
Source	DG GROW event participant logs + T4T online platform event participation logs							

2.5.3. Developing and renewing tourism education

Topic 21 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Incorporating new skills profiles in vocational education and training policy and curricula, through cooperation between education authorities, social partners and institutions for vocational and higher education</p> <p>Developing tourism curricula through cooperation partnerships with the support of Erasmus+ key action 2</p> <p>Developing skills and capacities of tourism education staff and students through Erasmus+ mobility opportunities for vocational and higher education</p>	<p>New skills profiles included in vocational education and training curricula</p> <p>Erasmus+ partnerships established for mobility and capacity development in tourism education</p>
<p>EU Agenda 2030 invites Member States to:</p> <p>support the development of the quality of education and skills needed by the tourism workforce, while respecting the principle of subsidiarity</p>	

New green technologies, more sustainable working methods, digital interaction with customers and innovative tourism services require profiles with new skills mixes.

Commission action: The Commission supports the development of education and training under the Erasmus+ programme for all areas of education, including vocational education and training (VET). [The Erasmus+ database](#) showed that in October 2023, there were 670 ongoing projects matching the keyword ‘tourism’. Stakeholders can propose any well-planned cooperative education development activity for funding under Erasmus+.

- 374 ongoing projects fall under Erasmus+ Key Action 1 (KA1) on learning mobility of students and educational staff. 47% of these projects are linked to VET and 19% to higher education.
- 276 ongoing projects fall under Erasmus+ Key Action 2 (KA2) on cooperation to develop, transfer and/or implement innovative practices and increase the capacity of educational organisations. 42% of these projects are linked to VET, 17% to adult education and 8% to higher education.

Member State action: A total of 8 Member States consider it a priority to develop new skills profiles for tourism education and training and the same number have introduced measures in this area. Moreover, 6 Member States have [shared their practices](#) in their TAC reports and 1 (Estonia) has also made a pledge on this topic.

Member State example: Malta

The Institute for Tourism Studies has recently launched a separate Training School to cater for re-skilling and upskilling of employees in the industry and for prospective employees. This provides hands-on, industry-related training. The training is accredited, can be off-the-shelf and bespoke, and can be delivered at the workplace. The courses cover six categories: hotel management, Food and Beverage, Travel and Tourism, Events and Leisure, Sports and Wellness; Other training.

<https://its.edu.mt/>

<https://www.trainingschool.its.edu.mt/>

Stakeholder action: key figures for transition pathway topic 21 pledges

16 pledges	8 Member States	9 organisation types	38% completed / with results
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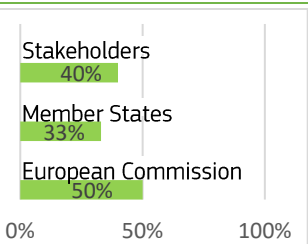
Concrete actions by stakeholders depend on their role and operating context. They include:

- SMEs collaborating with educational institutions to promote educational tourism and to collaborate on developing new curricula. Some of them are also providing their own training courses on specific tourism issues (diversity in tourism);
- academic institutions developing new curricula, such as for accessible and sustainable tourism, and including digital skills and environmental awareness in higher and vocational tourism education;
- business associations collaborating with academic institutions and SMEs to develop educational programmes which meet the tourism industry’s current needs (see example box below);
- an international organisation setting up online academy to promote global access to vocational and managerial tourism-related courses from top institutions;
- one regional administration boosting the skills of active employment seekers through vocational education in tourism marketing, sustainability or technology.

Example pledge with reported progress by Mirabilia Network

“Mirabilia Network has experimented, designed, and implemented multiple training courses aimed at companies or projects on topics related to a slower greener tourism offer. In this context, Mirabilia commits to the development of a Master in “Management of cultural heritage for tourism development” (Mirabilia Master) promoted by the Chamber of Commerce of Umbria (<https://www.umbria.camcom.it/>) to train new highly specialized professionals in the management and knowledge of Unesco sites. The Master takes place in the facilities of the University of Perugia.

The Mirabilia Master in “Cultural Heritage Management for tourism development,” combines teaching with ground experiences, held in networking with SMEs in the tourism ecosystem in the following cities: Perugia, Terni, Assisi, Castiglione del Lago, Foligno, Gubbio, Narni. The internships take place at identified places/companies agreed with Mirabilia and the Chamber of Commerce. The Master programme allows for four scholarships, two funded by Mirabilia and two funded by the University of Perugia. The scholarships cover enrolment fees. We plan to train 30 students by 2025. Currently, the programme is ongoing as a pilot, we commit to extending it further if the uptake is successful.”

Progress indicators for topic 21 by 2023 based on reported efforts	Change indicator: Number of Erasmus+ KA1 and KA2 activities with keyword ‘tourism’ labelled as ‘good practice’ per activity year	
 <p>Stakeholders 40%</p> <p>Member States 33%</p> <p>European Commission 50%</p> <p>0% 50% 100%</p>	Base value in 2023	156 (search on 4 December 2023)
	Expected for 2025	200 (increasing number of good quality tourism education development projects)
	Source	Erasmus+ programme website search

2.5.4. Pact for skills in tourism

Topic 22 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Establishing of national, regional and local skills partnerships in major EU tourism regions</p> <p>Engaging tourism companies, education providers, trade unions and other organisations to commit to jointly agreed training targets for their workforce</p> <p>Fast training courses, apprenticeship schemes and blended models for the unemployed and job seekers</p>	<p>The Commission, Member States and other relevant public authorities to facilitate and support the establishing of national, regional and local skills partnerships where feasible and in accordance with the existing framework</p> <p>The Commission to facilitate engaging tourism companies, education providers, trade unions and other organisations to commit to jointly agreed training targets for their workforces, in compliance with the principle of subsidiarity</p> <p>By 2030, a significant part of the tourism workforce to have participated in training in line with the targets of the Pact for skills in tourism</p>
EU Agenda 2030: Actions	Expected outputs
<p>Regional and national skills partnerships established in all Member States</p> <p>By 2030, 80% of tourism workforce has participated in training</p>	<p>Regional and local skills partnerships to be established in significant tourism regions by 2024</p> <p>By 2030, a significant part of the tourism workforce to have participated in training in line with the targets of the Pact for skills in tourism</p>

Commission action: The Commission facilitated the establishment of the [EU Pact for Skills – Skills partnership for the Tourism Ecosystem](#) in 2022, with 80 signing members in 2023. The [key targets](#) for the large-scale skills partnership include the establishment of national and regional skills groups and upskilling and reskilling 10% of the tourism workforce each year from 2022 onwards, as reflected also in the transition pathway and in the objectives of the EU Agenda 2030. The key objective of the partnership is to create training initiatives as collaborations between private-sector and tourism and hospitality institutes. Erasmus+ funding supports the large-scale skills partnership through funding the [PANTOUR](#) coordinating project and can also support the establishment of smaller partnerships.

Member State action: A total of 6 Member States considered that establishing regional and local skills partnerships for tourism is a challenge, and for another 6 it is a priority. From the respondents, 11 Member States consider upskilling and reskilling current and potential tourism workers as a priority, and 8 have taken measures to address these issues. Some 7 Member States [shared their practices](#) through TAC reporting and 1 (Malta) also presented a pledge.

Member State example: Portugal

“The "Closer Training" Programme, developed by the Schools of Turismo de Portugal in partnership with local authorities, was launched in February 2022 to decentralize training in tourism and adapt it to local needs throughout the national territory. The training programs vary between 50 and 200 hours and are tailored to each territory, based on a diagnosis carried out by Turismo de Portugal with each municipality; based on this diagnosis, a training plan is created to respond to the local needs of the tourist activity along with a complementary plan that contributes to the enhancement of the territory and to the training of employees from the municipality and/or partner entities.”

Stakeholder action: key figures for transition pathway topic 22 pledges

20 pledges	9 Member States	8 organisation types	30% completed / with results
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Concrete actions by stakeholders include:

- business associations supporting the implementation of the Pact for Skills in their area and offering training to actors in their sector or area;
- regional administrations aiming to build regional skills partnerships and collaborating with educational organisations to support vocational training that adjusts to the needs of businesses;
- trade unions joining Pact for Skills in tourism and following and actively participating in its actions, encouraging their members to build regional and local partnerships;
- large companies providing training to their employees and also to their partners and suppliers.

Example pledge with reported progress by TUI Care Foundation

“TUI Care Foundation will set up its online and open-source training platform called “TUI e-Academy” by 2023, to support the upskilling and reskilling of anyone working in the tourism industry. The TUI e-Academy will also help certify existing knowledge through its digital badges system. TUI will endorse these digital badges to add value to the certification that beneficiaries can earn through the platform, helping the industry to recognise learners of the TUI e-Academy platform. Furthermore, the TUI Care Foundation will offer course materials made by industry practitioners, providing innovative and thought-leading content for learners.

- TUI will launch its “TUI Sustainability Academy” by 2022, which will offer online learning modules for upskilling and reskilling. The platform will be made available for TUI employees first. After this first phase of implementation, the aim is to extend it to suppliers and partners of TUI Group.
- TUI will launch the “TUI Sustainability Agenda Learning Module” by 2023, aimed at providing all TUI employees with a thorough understanding of the Group’s sustainability agenda and focus areas; with the aim of fostering engagement and coordination across business areas.”

Progress indicators for topic 22 by 2023 based on reported efforts	Change indicator: Number of established national/regional skills partnerships in tourism	
<p>A bar chart with a vertical axis from 0% to 100% in 50% increments. Three horizontal bars represent progress: Stakeholders at 40% (green), Member States at 30% (green), and European Commission at 50% (green).</p>	Base value in 2022	3 in 2022, 6 in 2023
	Expected for 2025	12 (aiming for even growth of 3 partnerships per year)
	Source	DG GROW desk research

2.5.5. One-stop-shop for learning, best practices and networking

Topic 11 and 23 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Establishing a collaboration platform for tourism SMEs and destinations that supports their access to information, specific tools, best practice and knowledge sharing opportunities to support their engagement in twin transition (topic 11)</p> <p>Providing a user-friendly digital access point for tourism SMEs on payable/free self-learning resources and updated announcements of upcoming training events from different providers. (topic 23)</p> <p>Providing an online space where tourism SMEs can connect with each other to share learning from one another (topic 23)</p>	<p>Platform to be launched by 2023 (topic 11)</p> <p>Support through the stakeholder collaboration platform to be published by 2023</p>
EU Agenda 2030: Actions	Expected outputs
<p>The Commission to establish a stakeholder support platform to facilitate information-sharing, accessing resources and collaboration across tourism sectors and between actors.</p> <p>Member States, and other relevant public authorities and DMOs to inform their stakeholders and share relevant information on their results, events and resources for European audiences through the platform and other information channels.</p>	<p>Stakeholder support platform to be launched by 2023 with regular information-sharing, collaboratively developed content and community activities</p>

As the stakeholder co-creation process highlighted the need for better information availability and dissemination, several topics touched upon this issue. Especially, topic 11 emphasised best practice sharing and networking for SMEs and topic 23 raised the need to share information on learning opportunities for SMEs. These are grouped together here, as they will be addressed through one EU-level key action for the 'T4T' community: online stakeholder support platform that links together people and organisations searching, providing and creating knowledge and resources, and helps EU tourism actors to progress in their transition.

Commission action: In June 2023, the Commission launched the implementation of the [stakeholder support platform for transition pathways, with the first implementation for tourism ecosystem](#). Following the example of tourism, also other industrial ecosystems will benefit from the platform for supporting their transition pathways. The platform is planned to be opened to test users in spring 2024 and to the full tourism stakeholder community in summer 2024. Its key role is to increase the discoverability of relevant resources, such as the pledges, trainings and funding opportunities, and best practises provided by Member States and stakeholder organisations.

Member State action: As this action was envisaged to be mainly implemented by the Commission, it was not separately followed up by TAC reporting. However, under reporting relating to topic 27 (next section), Member States have also shared information about tools they have to support access to knowledge, resources and funding opportunities on tourism. Furthermore, Estonia has made a pledge on informing about and providing training

opportunities on tourism and Austria has made a pledge on establishing a community platform for its tourism industry.

Member State example: Estonia

“Estonian Tourism Board has an e-Academy that is free to use for every Estonian Tourism entrepreneur that has at least one service listed on VisitEstonia.com. The e-Academy at <https://www.puhkaeestis.ee/et/turismiprofessionaalile/koolitused-ja-seminarid/visit-estonia-eakadeemia> provides practical recommendations in eight areas: sales, marketing, accessibility, environment, products and services, collaboration, customer relations, management. In addition to that Estonian Tourism Board offers numerous free, paid or partly supported trainings to tourism sector employees, shorter or longer, virtual and in-person, for managers and specialists, in very different acute topics, starting from customer communication to green transition models: <https://www.puhkaeestis.ee/et/turismiprofessionaalile/koolitused-ja-seminarid>“

Stakeholder action: key figures for transition pathway topics 11 and 23 pledges



Concrete actions by stakeholders depend on their operating contexts and objectives; such actions include:

- business associations implementing support points and providing platforms to link SMEs with relevant support services; they will also provide online resources and networking opportunities between SMEs (see example box);
- SMEs investing effort in educating the employees of their collaborators, making information on training and support resources available to their partners through an online hub, and collaborating with international networks on best practice sharing and consultancy projects;
- NGOs developing and sharing best practice, providing training, and developing platforms to centralise access to resources and support for tourism SMEs;
- DMOs showing different types of approaches, such as developing a community platform, organising networking groups for their stakeholders, or appointing a person to provide consultancy for tourism service providers;
- a local administration setting up a one-stop shop to inform tourism entrepreneurs on education needs, funding opportunities, technical support and how to implement sustainability principles in tourism.

It is important that the EU-level T4T online support platform will become effectively linked to all the resource sharing efforts of the stakeholders, to fully optimise the synergies in knowledge sharing and creation. To support this, the Commission is developing the platform implementation in collaboration with the [T4T informal Commission expert group](#) representing different types of EU tourism stakeholders.

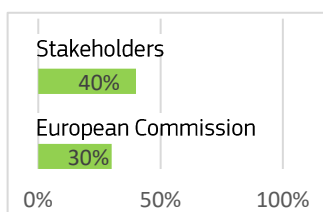
Example pledge with reported progress by Unioncamere

“Unioncamere, through Dintec, is committed to the creation of a platform called Matching Impresa Ricerca – MIR, that will allow companies to “meet” and be profiled by the Chambers of Commerce, to be accompanied to more targeted consulting services, and activated, through a platform, which bridges collaboration channels between the PID network (PID - Punto impresa digitale) of the Chambers of Commerce and the main research institutions that have joined the initiative. The initiative is not exclusively targeted to tourism SMEs. Thanks to the platform, the Chambers of Commerce will help companies to whose transformation needs will directly respond all the departments of the CNR and ENEA (the two main Italian research institutions) through their research teams that will take charge of the SMEs’ demands.

The tools are the starting point of activities aimed at supporting digitalisation of SMEs in the tourism ecosystem. Their use is not finalised at awareness raising but rather as an initial assessment to implement further tailored support.

We plan to extend participation to the platform to other laboratories and research institutions, and universities in Italy. The platform will be in testing end of 2022 and is scheduled for launch in 2023. In the pilot phase expected impact is difficult to assess and usually redefined using data a year from launch. With current information, we expect to support for tailored counseling at least 15 companies in the tourism sector to be involved by 2025 and 65 by 2030.”

Progress indicators for topics 11+23 by 2023 based on reported efforts



Change indicator: Monthly number of new content items/references made available on the stakeholder support platform to support 27 areas of the transition of EU tourism

Base value in 2022	Not applicable (platform to be launched in 2024)
Expected for 2025	50/month (including reports, projects, events, articles, news items, etc)
Source	T4T platform monthly progress reports submitted to DG GROW

2.5.6. Visibility of funding opportunities for tourism

Topic 27 related actions in transition pathway and EU Agenda 2030

Transition pathway: Actions	Expected outputs
<p>Enhancing the ‘Guide on EU funding for tourism’ by providing information on recently funded projects and upcoming calls</p> <p>Ensuring effective communication on the direct SME support provided under COSME actions in the Member States</p> <p>Providing a one-stop-shop that links to key support resources and funding opportunities for tourism SMEs on European, national and regional level</p>	<p>Supporting these through the stakeholder collaboration platform to be published by 2023</p>
EU Agenda 2030 invites the Commission to:	
<p>identify relevant financing opportunities for Member States and stakeholders through the existing EU budget and other sources to work towards the objectives recognised in this Agenda, through the regular updating of the ‘Guide on EU funding for tourism’ and other means</p>	

Commission action: The Commission has drawn up and actively maintains the [Guide on EU funding for tourism](#), summarising aspects of 17 EU funding programmes with potential to support tourism and giving examples of recently funded projects. Since 2022, the Guide includes a section called ‘Open tourism calls’, which highlights currently open funding opportunities relevant to tourism ecosystem actors. All open tenders and funding opportunities under EU funding programmes, including cascading funding from organisations and clusters providing direct support for SMEs under the Single Market Programme, are published on the [EU funding and tenders portal](#).

The upcoming T4T stakeholder support platform will include all these calls in its calendar, together with calls notified by national and regional actors, and links to support resources such as the Your Europe Business [dedicated section for the tourism ecosystem](#) opened in 2023 to provide resources for tourism businesses and the [guide to EU funding opportunities to digitalise businesses](#) published in 2022.

Member State action: A total of 9 Member States reported that it is a priority for them to provide effective information channels where stakeholders can find knowledge, resources and funding opportunities, and 12 Member States have specific measures to address this issue. A total of 5 Member States [shared their practice](#) through TAC reporting.

Member State example: Croatia

“Ministry of Tourism and Sport created a sub-page Croatia, naturally yours <https://mint.gov.hr/odrziviturizam> which contains info about projects, funding opportunities, international cooperation in tourism, education and tourism management and relevant news.”

Stakeholder action: key figures for transition pathway topic 27 pledges

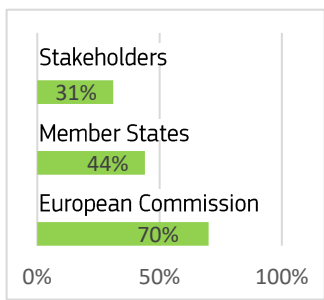
9 pledges	4 Member States	5 organisation types	48% completed / with results
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While the topic initially focused on the visibility of funding opportunities, stakeholders are also proposing other ways to support funding for tourism actors, such as:

- a regional administration working with EU co-funded programmes to provide funding for tourism actors;
- NGOs sharing information on funding opportunities but also informing about results and lessons of previously funded projects, as a basis for preparing new funding calls and project proposals (see example box below);
- a network of organisations promoting the ‘Guide on EU funding for tourism’ at its events;
- an SME providing support services to tourism actors for identifying funding opportunities, developing proposals and going throughout the application process; the SME also disseminates information on funding opportunities through podcasts, webinars and events.

Example pledge with reported progress by NECSTouR

“As we close the Sustainable Tourism Community project in December 2022, we are producing meaningful deliverables, including a Handbook on the use of Next Generation Recovery Funds and ERDF Funds 2021-2027 for the sustainability of tourism in the Mediterranean that will be published and presented during the European Week of Regions and Cities. Through this handbook, we can give good advice to Managing Authorities of the RRF and ERDF on which kind of projects (mainstreamed by calls for proposals) the tourism sector needs to go into the greening-digital transition, within and beyond the MED area. To do so, we will share the handbook results with other stakeholders across Europe during the European Week of Regions and Cities through a workshop called “The transition towards a smarter and greener sustainable tourism ecosystem in the Mediterranean.”

Progress indicators for topic 27 by 2023 based on reported efforts	Change indicator: Number of open tourism-related funding calls notified to stakeholders									
 <table border="1" style="display: none;"> <caption>Progress Indicators for Topic 27 by 2023</caption> <thead> <tr> <th>Stakeholder</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Stakeholders</td> <td>31%</td> </tr> <tr> <td>Member States</td> <td>44%</td> </tr> <tr> <td>European Commission</td> <td>70%</td> </tr> </tbody> </table>	Stakeholder	Percentage	Stakeholders	31%	Member States	44%	European Commission	70%	Base value in 2022	68 open calls in 2022 notified through the Guide on EU funding for tourism
	Stakeholder	Percentage								
	Stakeholders	31%								
Member States	44%									
European Commission	70%									
Expected for 2025	150 (EU calls + calls by Member States and regions notified through the T4T stakeholder platform)									
Source	‘ Guide on EU funding for tourism ’ and EU funding and tenders portal , from 2024 onwards T4T platform reporting on tourism funding calls									

3. Stakeholder engagement analysis

As shown in the previous sections, stakeholder engagement through pledges varies between topics. This relates to the nature of each topic and its objectives, but also to the roles and objectives of different types of stakeholder organisations. With a basis of 424 pledges by October 2023, it is possible to provide some overall insights and make suggestions for furthering stakeholder engagement and collective progress in achieving the transition pathway objectives.

3.1. Commitment to the vision and pledges to take action

While all stakeholders were invited to present commitments to take action, some only expressed their support for the transition pathway, referring to their aligned visions or past work. These contributions were valuable demonstrations of stakeholders’ awareness of and interest in the transition pathway, but they are still different from concrete commitments to action with a measurable target for the future. Therefore, differentiating terminology was created: ‘pledges’ describing concrete commitments to future action with a clear target, and general ‘commitments’ reflecting stakeholders’ expressed interest in supporting the transition pathway without clearly described action and targets to be shared with other stakeholders.

By October 2023, of 204 organisations that have expressed their support for the transition pathway, 63% (128 organisations) have formulated and submitted concrete action pledges with expected results that can be followed as indications and examples of transition taking place. Figure 11 shows the origin of these organisations. Belgium leads the number of stakeholders making concrete pledges to take action, as many EU-level network organisations or NGOs are based in Brussels. The four next largest pledge origin countries (Spain, France, Italy and Germany) are the largest tourism countries in the EU, [accounting for 62% of the total nights spent by non-residents of the country in 2022](#). Altogether these five Member States counted for 59% of organisations with pledges.

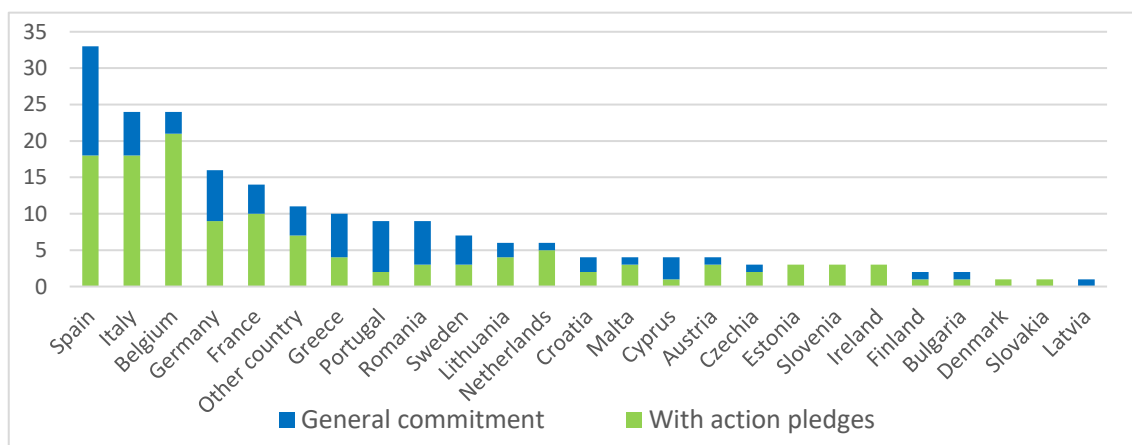


Figure 11: Number of organisations with general commitment or published action pledge(s) to support the transition pathway for tourism

To broaden the impact of the transition pathway across the EU, it would be important to encourage more organisations to make pledges especially organisations from all the countries where tourism plays a key role in the economy and few pledges have been received, such as Croatia, Portugal, Austria, Estonia, Latvia and Ireland (above EU average in terms of [direct economic contribution of tourism](#)). Currently, there are no pledges from Hungary, Latvia, Luxembourg and Poland yet.

Interestingly, there are also organisations from non-EU countries that have expressed their interest in supporting the transition pathway for tourism. A total of 11 organisations (5.4% of all organisations that have expressed their support) from 10 countries (Albania, Bosnia and Herzegovia, Japan, Liechtenstein, Montenegro, North Macedonia, Norway, the UK, Switzerland, and the USA) have expressed their commitment, and of these, 7 organisations have made 15 pledges in total. They are often international organisations or companies interested in supporting the EU objectives for more sustainable and resilient tourism, and in aligning them with their actions on a global scale.

3.2. Pledge submitter diversity across topic areas

Both private and public sectors are actively involved in implementing the transition pathway. SMEs are the key actors of the ecosystem and are showing their engagement by taking concrete actions across all areas of the pathway with 69 pledges (16% of all pledges). Their pledges address the digital transition more often than those from other groups of actors. This may be because digitalisation is a key aspect of innovation for their own activities and for the services that they can offer to tourism providers and directly to tourists themselves.



Figure 12: Areas of pledges by type of organisation by October 2023

Typically, actions described in pledges relate to the key roles of the organisations – business associations support capacity development of their members, public administrations focus on policy and governance, DMOs consider marketing, NGOs support their specific area of

interest, and companies develop tourism transition with the view to improving also their own competitiveness. However, all organisations are pledging to take actions on more than one area, demonstrating that they can see themselves as contributors to all key dimensions of the transition. The Commission has supported sharing of the examples of these innovative organisations with those who are still reflecting on how the transition pathway could link with their daily work and challenges. Since 2022, the Commission has organised [open tourism stakeholder community events twice a year](#) to share examples and best practices on making concrete pledges. Furthermore, in the context of the [European Tourism Day 2023](#) engaging video stories were created and shared online to highlight pledge examples by different types of organisations.

Trade unions and consumer organisations are involved but not yet to a great extent. Attention should be paid to involving them, as key issues in the transition are to make tourism jobs more attractive and to support demand for economically, environmentally and socially sustainable tourism.

3.3. Stakeholder achievements and progress beyond pledges

The stakeholders involved in this first stock-taking exercise have highlighted that a lot of stakeholder efforts with significant contributions to the transition pathway for tourism also take place outside of collected stakeholder pledges. Especially, there are several tourism-relevant projects implemented under EU funding programmes and by other national and international funding mechanisms.

The T4T expert working groups and the T4T online stakeholder support platform could help in taking stock of the extent and key results of this work too in the future. Such a broader analysis could support the preparation of the 3-yearly report on the progress of the EU Agenda for Tourism 2030, and identifying needs for further work and support.

4. Other issues

In addition to the named 27 action topics of the transition pathway for tourism, the policy report also summarised other issues in need of attention, based on the co-creation discussions with stakeholders. Some of these issues without a dedicated topic have gained visibility in the changing context of EU tourism. At the same time, new areas of concern and potential are emerging. This section proposes areas to be followed in future reporting, together with the dedicated action topics of the transition pathway.

4.1. Consumer and traveller perspective

The transition pathway's co-creation approach focused mostly on the perspective of the tourism services facilitator and provider, while recognising that also the consumer and traveller perspectives should be considered. No green or digital transition in services can be achieved unless customers are aware of their role, interested in and skilled at recognising green service options, and use the necessary digital tools to find them.

Consumer protection policies. Based on [European Consumer Centres Network reporting](#), tourism remains number one for cross-border consumer disputes in the EU. In 2022, international flight services caused 20% of all consumer dispute resolution requests. Key policy developments on consumer protection since the publication of the transition pathway include the proposed revisions to the passenger rights regulations ⁽¹⁴⁾ and the Package Travel Directive ⁽¹⁵⁾. The Commission proposals aims to better address the vulnerabilities, which became even more apparent during COVID-19 from both the consumer and the service provider perspective.

Supporting sustainable behaviours. Since the very beginning of the transition pathway co-creation, private-sector stakeholders have highlighted the need to have demand for sustainable travelling, in order to invest in it. There is a need for best practices in promoting responsible travelling in the EU, respecting nature and the well-being of local residents – not treating destinations as just service providers but as places where people live and where authentic interaction with them can bring enriching inter-cultural experience for both sides. The pilot project on [best practice exchange and twinning to support the resilience and sustainability of tourism destinations](#), supported by the European Parliament, will develop such communication campaigns for sustainable travellers. In addition to promotion, new approaches could be developed also by exploring application of behavioural sciences, such as shown by the project [Nudge my tour](#). As an important group, young travellers will shape the future of tourism and they should be educated and advised on sustainable travelling. The [Discover EU initiative](#) plays an important role in promoting sustainable travelling to learn about European history, cultural heritage and inter-cultural experiences for young people. Collecting ideas from these people could provide useful insights for EU tourism transition.

Promoting Europe as a safe, attractive and sustainable destination. Since the start of Russia's war of aggression against Ukraine in February 2022, travel and tourism to

⁽¹⁴⁾ [Passenger rights \(europa.eu\)](#), see proposals COM (2023)752 and 753 final of 29.11.2023

⁽¹⁵⁾ [Package travel directive \(europa.eu\)](#), see proposal COM(2023)905 final of 29.11.2023

neighbouring regions has suffered. The [European Travel Commission](#) and the European Commission have set up a long-term strategic partnership to promote the EU and Europe as a tourism destination. The current ‘[Europe invites the curious](#)’ global campaign aims to build a distinctive image of Europe as a travel destination in long-haul markets, maintain the European travel market share and better distribute traveller flows more evenly in terms of geography and seasons, all the while considering aspirations for sustainability in tourism and its growth.

4.2. Emerging issues and increasing attention

Several issues that were recognised as important in the co-creation phase of the transition pathway, but in the final version of the actions were combined with other aspects, have gained visibility and importance since the publication of the initial report. This suggests that in the future, they could be considered as potential action topic areas of their own, with key deliverables and targets for each group of actors.

Climate change was already part of the co-creation discussion with stakeholders, linked with green transition (climate change mitigation), with resilience (climate change adaptation) and with policy and governance as a key aspect that should be considered in building long-term destination strategies and crisis governance. Destinations and services are increasingly faced with the need to adapt the tourism offer to changing climate conditions and to build mechanisms for crisis preparedness and management. Of all pledges presented by stakeholders, 38 (9%) refer to climate, demonstrating the importance of this aspect cutting across ‘green transition’, ‘resilience’ and ‘policy and governance’ dimensions of the transition pathway. The Commission has published key reports on estimating and addressing the impact of climate change on tourism: [Regional impact of climate change on European tourism demand](#), [Strengthening cultural heritage resilience for climate change](#), and [Compendium of good practices and solutions of climate change adaptation in the Outermost Regions of the EU](#). The study on [crisis management and governance in tourism](#) launched in 2023 will also address crisis preparedness for extreme weather events.

Well-being of local communities and social sustainability. The influx of tourists can sometimes lead to increased prices for goods and services, making it challenging for local residents to afford a decent standard of living. To counteract this, and to achieve truly responsible and sustainable tourism, strategies should be developed to ensure that the benefits of tourism reach local communities, preventing gentrification and economic exclusion. The Spanish Presidency of the Council of the European Union in the second half of 2023 highlighted social sustainability of tourism as a key issue, adopting with all EU Member State ministers the [Palma Declaration on social sustainability of tourism](#). Social sustainability and long-term well-being of local communities were highlighted in the transition pathway co-creation phase; eventually they were included to be considered under four specific topics: tourism measurements (topic 3), tourism strategies (topic 4), collaborative destination management (topic 5) and diversification of services (topic 26). However, recovery from the COVID-19 pandemic has also brought back and even intensified overtourism. Stakeholders have suggested launching a socio-economic impact assessment study to: (i) evaluate positive and negative effects of tourism development; and

(ii) identify measures that should be applied to minimise negative impacts and maximise positive outcomes for local residents.

Social economy and regenerative tourism. While the [social and proximity economy ecosystem has a transition pathway](#) of its own, its working models and actors can also be a transformative force for the tourism ecosystem, and these interlinkages are worth following. Interesting examples include [Fairbnb](#), which acts as an intermediary in arranging short-term accommodation rentals and donates part of its commission to the local community project of the client's choice. [SPOT](#) and [TexTOUR](#), two cultural tourism-related R&I projects on social economy, are showing potential new models for small actors to work together, share resources and address diversification challenges of tourism services in both urban and rural areas. Furthermore, there are sustainably responsible travel service providers, such as [Goodwings](#) where clients can choose to use the commission for the travel services to pay for plant-based jet fuel or to support other initiatives to offset carbon emissions.

4.3. Investments and funding supporting tourism

EU funding across several programmes supplements Member States and regions' investments in the digital and green transformation, and in the sustainability and resilience of the tourism ecosystem. Supporting and monitoring effective use of the various funding opportunities summarised by the '[Guide on EU funding for tourism](#)' would be a useful part of future stock-taking efforts. The upcoming online stakeholder support platform can play a role in this by gathering information on projects funded under EU programmes and projects funded by national and regional actors. Below are some examples of funding allocations to the tourism ecosystem:

- Under the Recovery and Resilience Facility (RRF), the approved Member State plans show that approximately EUR 11.35 billion (2.6% of the total RRF funding) is estimated to be invested in the tourism ecosystem by 15 Member States.
- In the 2021-2027 period, Member States and regions have allocated EUR 4.2 billion ⁽¹⁶⁾ to sustainable tourism support under programmes funded by the European Regional Development Fund (ERDF), including its European Territorial Cooperation strand (Interreg). ERDF Specific Objective 4.6 is dedicated to sustainable tourism and culture under Policy Objective 4 ('a more social and inclusive Europe'). These are key resources supplemented by other EU programmes under which money is available for several ecosystems, including tourism.
- The Single Market Programme aims to boost the competitiveness, capacity building and sustainability of SMEs, including in the tourism sector. Annual calls have been launched under the SMP to support tourism SMEs in becoming more resilient, sustainable and digitalised. The total budget allocated to tourism projects and beneficiaries by the calls launched under the SMP amounts to EUR 40.7 million.

⁽¹⁶⁾ The tourism ecosystem can also benefit from indirect support in other areas under the ERDF, including social inclusion, integrated territorial development in urban and non-urban areas and significant general business support (including for digitalisation, energy efficiency, greening and internationalisation). For more information, please see the Cohesion Open Data Platform: <https://cohesiondata.ec.europa.eu/>

- European Parliament has provided budgetary support, which has made possible several pilot projects and preparatory actions, as well as a EU 10 million budgetary top-up to the 2022 SMP budget for tourism. Their support amounts to EUR 21 million between 2021-2023.

The [sustainable finance](#) policy package published in June 2023 aims to ensure that the EU sustainable finance framework continues to support companies and the financial sector, while encouraging the private funding of transition projects and technologies. This included adopting the Environmental Delegated Act under the EU Taxonomy Regulation laying down conditions for additional activities to be classified as significantly contributing towards four environmental objectives: (i) sustainable use and protection of water and marine resources; (ii) circular economy; (iii) pollution reduction; and (iv) protection and restoration of biodiversity and ecosystems. Tourist accommodation was included under '[protection and restoration of biodiversity and ecosystems](#)', setting the conditions operators of tourist accommodation establishments have to comply with in order for their activities to count as sustainable activities under the EU taxonomy.

[EMI Tourism report](#) analyses investments raised, foreign direct investment and support through public procurement notices for tourism-related services. This provides useful information for annual follow-up and could be potentially linked with the follow-up of sustainable financing and green public procurement notices.

4.4. Optimising synergies and the impact of results

This stock-taking report has demonstrated that first concrete results are already emerging across all topic areas of the transition pathway. This highlights the importance of disseminating these results and facilitating synergies between actors.

Targeted best practice exchanges. Collecting and publishing pledges and facilitating stakeholder networking at European level is important, but the real changes happen when actors gain and exchange concrete practical knowledge. This is most effectively supported through bilateral discussions between people and organisations with shared interests, finding the right information at the right moment. Key roles can be played by:

- the T4T expert working groups, by supporting focused exchange sessions of best practices;
- the T4T online stakeholder support platform, by making best practices visible and discoverable across actors based on their interests in a user-friendly manner;
- the pilot action launched in 2023 with the support of the European Parliament to provide [technical assistance to tourism destinations through best practice exchange and twinning](#).

Synergies between data and indicators development efforts. Preparation of this report has shown that for many areas of desired action and progress there are no EU-level data to be used as a basis for progress indicators. This is directly related to transition pathway topic 3 on developing tourism measurements, where several efforts are ongoing:

- Member States developing their national data collection mechanisms and national statistics institutes collaborating with Eurostat;
- regional public actors and institutes, possibly collaborating with [UNWTO INSTO observatories](#) or national statistics institutes to develop data collection mechanisms;
- Cities and DMOs developing data collection mechanisms for their own use, such as resident surveys;
- the UNWTO developing [a statistical framework for measuring the sustainability of tourism](#), and a set of comparable indicators;
- the [EU Tourism Dashboard](#) demonstrating how to develop indicators and visualise them when data sources exist – relying strongly on Eurostat data and combining it with other sources including big data;
- the [EU Competence Centre for data management](#) in tourism destinations (D3HUB) supporting destination-level data development and management in a manner compatible with aggregating data to provide official statistics.

Synergies between these efforts should be sought and maximised, between stakeholders, EU Member States and with international actors. T4T expert working groups can play a key role in this by supporting the Commission and Member States in finding alignments and agreements where possible. Progress on comparable indicators and data collection mechanisms on economic, environmental and social tourism aspects is a key area to be followed. This work should contribute to considering options to revise the [Regulation \(EU\) 692/2011](#) on European statistics on tourism to meet the needs for supporting the transition of EU tourism.

5. Conclusions

This report is the first analysis of the [transition pathway for tourism](#) since it was developed through an 8-month-long co-creation process in 2021 and published in February 2022. Now, 2 years later, this stock-taking effort has aimed to follow a similar inclusive approach and asked stakeholders for their contributions on how to evaluate the progress and what to include. It also contributes to the follow-up of the [EU Agenda for Tourism 2030](#), which has a workplan that is aligned with the transition pathway work topics. Improving the coverage of TAC reporting in upcoming years will help capture better the effort, progress and example practices of the Member State administrations' work towards these strategic objectives.

The final published transition pathway for tourism comprising 27 topics and 70 actions was a balanced compromise between the interests of all involved actors and the necessity to formulate concise messages. The report could not reflect all the richness of the co-creation discussions and grouped many specific messages at a more general and abstract level. This original richness of the needs and potentials to act towards common goals is emerging again through pledges, showing the interlinkages between transition pathway topics, and how one topic can actually include several different work objectives. Although progress monitoring is structured based on 27 topics and pledge allocations under them, in reality many pledges or actions could be placed under other topics as well.

The essence of the transition pathway resides in these individual actions taking place, and significant effort should be made to help each stakeholder find inspiring examples relevant to them. This is a key task for the TAC, [T4T expert working groups](#) and the upcoming T4T stakeholder support platform. They should accelerate the EU tourism transition by making visible inspiring, useful and implementable examples for all types of tourism actors across the EU – and help them become aware of them.

The report has established a practical method to observe different aspects of progress in each transition pathway area, making clear that all groups of actors have a role to play. This method makes it possible to compare progress between actors to some extent and, most importantly, to follow progress from one year to another. In addition to indicators for transition pathway work progress, the report proposes change indicators to be followed on several aspects of EU tourism. The selection of these indicators has been conditioned by data availability, highlighting the importance of progressing on transition pathway topic 3: improving availability of tourism data and statistics, as many of the indicators originally suggested by stakeholders could not be selected due to lack of data.

The analysis and interactions with Member States and stakeholders show that the currently most advanced areas of collective work are: 1) establishing tourism strategies that consider and follow economic, environmental and social impacts of tourism at the relevant level (i.e. national, regional and/or local); 2) improving statistics on and measurements of tourism impacts; and 3) green and digital transition support for SMEs and destinations. These are crucial areas, as they provide key support in advancing the green and digital transition and building tourism destinations with attention to long-term well-being of local communities. Also topics that aim to improve skills and overall stakeholder support have attracted many

pledges. Nevertheless, much more work needs to be done in these areas as they are instrumental enablers for all other actions.

Progress analysis shows that all groups of stakeholders successfully engaged on most transition pathway topics. On some topics, especially those that were mainly targeted for the Commission action (travel restrictions, multimodal transport), they only engaged to a lesser extent. This suggests that the wording of transition pathway actions and objectives has an impact on how effectively they mobilise stakeholders. Organisations only take action on topics and objectives that they consider relevant to their activities, roles and objectives. Nevertheless, the pledges show that stakeholders do not confine themselves to isolated 'boxes' of transition pathway topics but innovate and take action across boundaries. This is positive, as the transition pathway should not be a restrictive frame but an enabling, inviting and engaging tool to encourage collective transformation and accelerate it by building and optimising synergies between actors.

By October 2023, stakeholders from almost all Member States, together with 10 other countries (Albania, Bosnia and Herzegovia, Japan, Liechtenstein, Montenegro, North Macedonia, Norway, the UK, Switzerland, and the USA), have been engaged in one form or another. However, not all of them are taking concrete action or sharing their targets and progress with peers yet. This is a collaborative effort where everyone's work is needed and appreciated. Sharing concrete actions with clear targets should not be something to be afraid of as this is a collaborative creation, learning and transformation process. Awareness of this collaborative call for action, and support for designing meaningful actions and targets for each stakeholder should be further extended. This highlights the role of the Member States in raising awareness and calling for action in their regions, and of the [T4T expert group](#) in delivering the messages to all types of organisations. Actors from all Member States should be brought on board, with peer support within their country and across borders.

This first transition pathway progress analysis suggests that some of the current transition pathway areas could be refined in the future to reduce overlap, remove obsolete objectives and replace them with new areas and needs. Moreover, wording of topic areas and objectives could be clarified to steer the actions of all groups of stakeholders more effectively. Work on the transition pathway began with a co-creation process and this first progress stock-taking has revealed that this process is continuing. Although stakeholders are already implementing their actions, they are reshaping the ecosystem's path and focus areas towards the shared objectives at the same time.

While not perfectly formulated, the current transition pathway topics and areas serve well as a guide for the work of stakeholders and help to assess aspects of progress in the transition. The progress analysis proposed in this report provides a useful overview for policy makers and stakeholders at European, national, regional and local levels, together with concrete examples. Future updates of the established indicators in 2024 and 2025 could provide comparable and cumulative information as input to the first 3-yearly reporting on the [EU Agenda for Tourism 2030](#) to the Council of the European Union. After this, the report and Member State guidance could be used to launch a reshaping process for both the transition pathway and the EU Agenda 2030 as a collaborative process with all key stakeholder groups, which have already learned to work together towards shared goals in a new manner.

Annex I: Topics of the transition pathway

More information on the actions, the objectives and the transition context can be found in the [transition pathway for tourism report](#), available in 22 languages.

Topic no	Topic name
TOPIC 1	1: Fair measures for Short-Term Rentals (STR)
TOPIC 2	2: Regulatory support for multimodal travelling
TOPIC 3	3: Improving statistics and indicators for tourism
TOPIC 4	4: Comprehensive tourism strategies development or update
TOPIC 5	5: Collaborative governance of tourism destinations
TOPIC 6	6: Sustainable mobility
TOPIC 7	7: Circularity of tourism services
TOPIC 8	8: Green transition of tourism companies and SMEs
TOPIC 9	9: Data-driven tourism services
TOPIC 10	10: Improving the availability of online information on tourism offer
TOPIC 11	11: Easily accessible best practices, peer learning and networking for SMEs
TOPIC 12	12: R&I projects and pilots on circular and climate friendly tourism
TOPIC 13	13: Promoting the use of PEF and OEF methodology for tourism ecosystem
TOPIC 14	14: Technical implementation for common European data space for tourism
TOPIC 15	15: R&I for digital tools and services in tourism
TOPIC 16	16: Support for digitalisation of tourism SMEs and destinations
TOPIC 17	17: Seamless cross-border travelling
TOPIC 18	18: Coordinated management and updated information on travelling
TOPIC 19	19: Awareness raising on skills needs for twin transition in tourism
TOPIC 20	20: Awareness raising on changes in tourism demand and the opportunities of twin transition
TOPIC 21	21: Educational organisations to engage in developing and renewing tourism education
TOPIC 22	22: Pact for skills in tourism
TOPIC 23	23: One-stop-shop for learning opportunities for tourism SMEs
TOPIC 24	24: Fairness and equality in tourism jobs
TOPIC 25	25: Enhancing accessible tourism services
TOPIC 26	26: Tourism services for visitors and residents alike
TOPIC 27	27: Support visibility of funding opportunities for tourism actors

Annex II: Summary of progress across topics

Throughout the report, progress across the transition pathway for tourism topics has been assessed and presented by taking a systematic approach. The approach acknowledges that the key task of the transition pathway is for different types of actors to work together in order to make transition happen:

- the Commission in its role to facilitate sharing of best practice, support stakeholders to act, and present proposals for legislative actions to the co-legislators;
- Member States in their role to take legislative actions and determine budget for tourism-related support activities;
- public and private stakeholder organisations with their respective capacities to act depending on their context, role and objectives.

For each of these key actor groups, the report proposes quantitative progress values in every action area, based on the information collected and calculated using the formula presented in Table 3. This formula reflects the visible effort and progress made on the actions and objectives set out in the transition pathway. The objective assessment of the status of the ecosystem is supplemented by the change indicators listed in Annex III.

Table 3 – Topic-based progress evaluation for key actor groups

Key groups	Progress calculation formula	Min	Max
European Commission	A qualitative estimation that produces a numerical value that reflects the completion rate by the European Commission with respect to the outputs outlined in the transition pathway report Annex I. This estimation is done by considering the reported results summarised for the topic, originally expected outputs and still remaining work. For example, if originally expected outputs were legislative measures and they have been adopted by end of 2023, Commission work still remains in supporting implementation of the legislation, monitoring and enforcing it. Therefore, legislative action completion would be considered as 50% and implemented support initiatives would add to the estimated effort value.	0	100
Member States	Share of Member States taking measures based on reporting through TAC or with submitted pledges	0	100
Stakeholders	<u>Pledge ratio</u> : (Number of pledges in topic / average number of pledges per topic) / (maximum value for number of pledges / average)	0	100
	<u>Pledger diversity</u> : (Share of pledge origin Member States [x/27] + Share of pledge origin organisation types [x/14]) / 2	0	100
	<u>Pledge results</u> : Share of pledges with progress reported as “fully completed” or “in progress with sharable results”	0	100
	Stakeholder action total: (ratio + diversity + results)/3	0	100

Creating one common progress evaluation formula gives a tool to systematically compare how transition is advancing across different groups, and to monitor the progress from one year to another. Figure 13 presents each stakeholder group’s effort progress in the action areas of the transition pathway as estimated using this formula. A later Figure 16 shows how the progress of each group could be added together, showing a theoretical quantitative ‘overall progress’ estimation across transition pathway topics.



Figure 13: Estimated effort progress (0-100%) made across transition pathway topics by key groups of actors

Number of and progress on pledges

For this stock-taking exercise, the stakeholder organisations who had pledges published in the first three publication rounds (June 2022, October 2022, March 2023) were contacted in summer 2023 and were asked to report on their pledge. The reporting was structured through a spreadsheet, giving response options for each pledge to be chosen between: 1 – fully completed; 2 – in progress with shareable results; 3 – in progress; and 4 – needs revision. This information underpins the stakeholders’ ‘pledge results’ element of the progress analysis following the formula of Table 3. Pledges from the latest pledge publication (October 2023) have been considered by default as ‘in progress’ since they had just been launched.

Figure 14 summarises the distribution of the 424 pledges received by October 2023 by reported progress. Of all pledges, 10.6% are about the green transition of tourism SMEs; this is the most common area of pledges to already show shareable results. Next most common

topics for pledges are development of tourism strategies (8%) and improving statistics and indicators for tourism (7.5%). Overall, only 1 year after the first pledge publication, 8% of pledges have reported full completion of their objectives already, and 34% of pledges are in progress with shareable results.

The figure also shows three pledges under topic 28, which allowed stakeholders to propose pledges that they considered not to belong under any of the 27 established transition pathway topics. Closer analysis of these pledges shows that in reality, they could have been linked to several areas, as for example 3-D modelling of cultural heritage could at the same time support the common European data space for tourism, help develop innovative digital tourism services, promote accessible services development and support sustainable diversification of tourism services at the destination. This shows an example of a concrete action that can support several transition pathway topics.

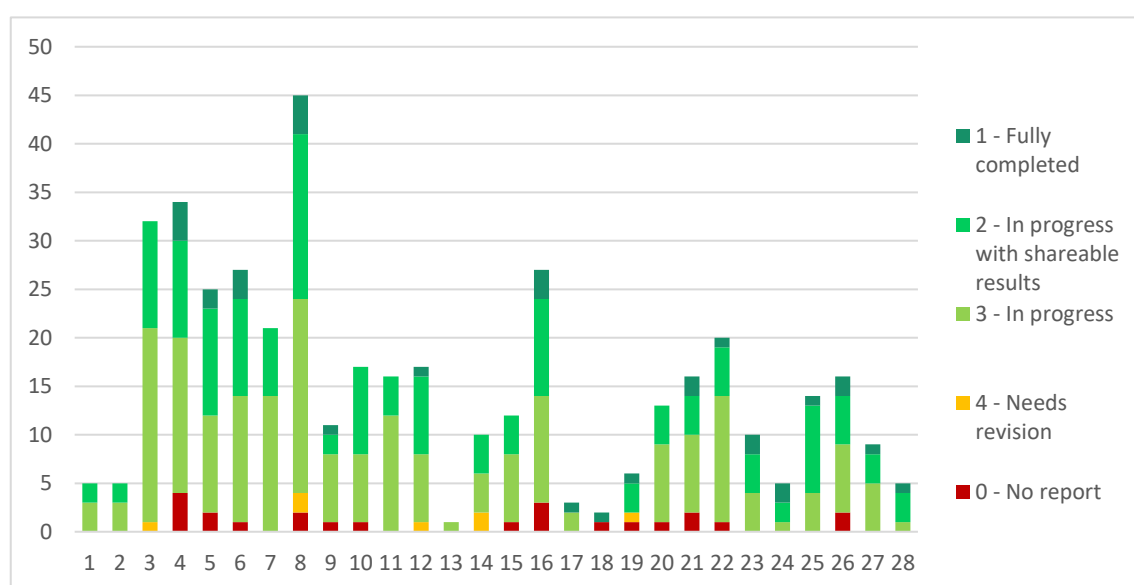


Figure 14: Number of pledges with their reported progress across topics

Diversity of stakeholder engagement

A key aspect of the transition pathway for tourism is to ensure that all groups of stakeholders are engaged, as this is an area where the public and the private sector, as well as the third sector organisations need to work together to find good ways to make progress, share information, build capacity, and transform EU tourism together. If we consider participation of actors from all EU Member States and all types of organisations as equally important, we can derive an engagement diversity indicator for each transition pathway topic based on the origin of pledges received.

Figure 15 demonstrates how the value of the engagement diversity index (share of pledge origin Member States + share of pledge origin organisation types) varies across topics. The three topics that have managed to engage stakeholders most broadly related to improving tourism measurements, developing tourism strategies and digitalising SMEs and destinations. These appear as the most relevant key issues to a broad group of stakeholders across the EU. The lowest diversity of engagement can be observed in developing environmental footprint

methodologies and in EU-level sharing of information on travel restrictions. In both these topics, the Commission plays a paramount role.

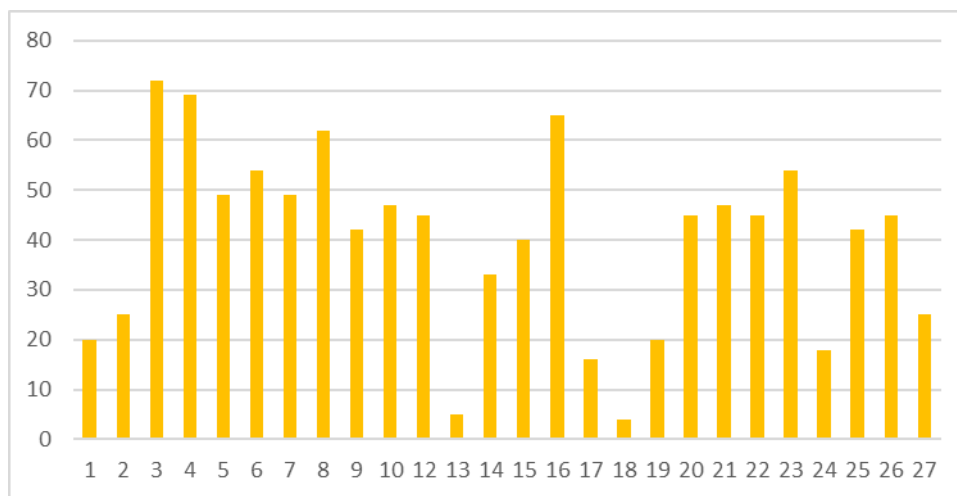


Figure 15: Engagement diversity index for transition pathway topics

Overall progress on pledges

Based on the progress analysis formula presented in Table 3 for the key groups (European Commission, Member States, stakeholders) it is possible to build an overview picture (see Figure 16) of the visible effort and progress made across all transition pathway topics by adding separate elements together. This is a theoretical view, as in practice some of the current topics require more action from one group than other groups. However, even though it is only a theoretical exploration tool, it can provide some insights into the current status, and a potentially useful comparison can be made in the upcoming years.

The action topic with the strongest overall progress is tourism strategies, with strong support from the Commission to share best practice, active engagement by Member States, and collective work by a broad diversity of stakeholders. Improving statistics and indicators for tourism and the green transition measures of tourism companies are the next action areas, supported by the active engagement of stakeholders in addressing them.

When considering the five key areas of transition, most progress was made on policy and governance, green transition, and skills and stakeholder support. Attention is needed to improve the engagement of all actor groups in the topics relating to digital transition and resilience and inclusion. Reformulating and providing explanatory guidance on the objectives so that they have a more concrete link with the current work and contexts of stakeholders could help in this task.

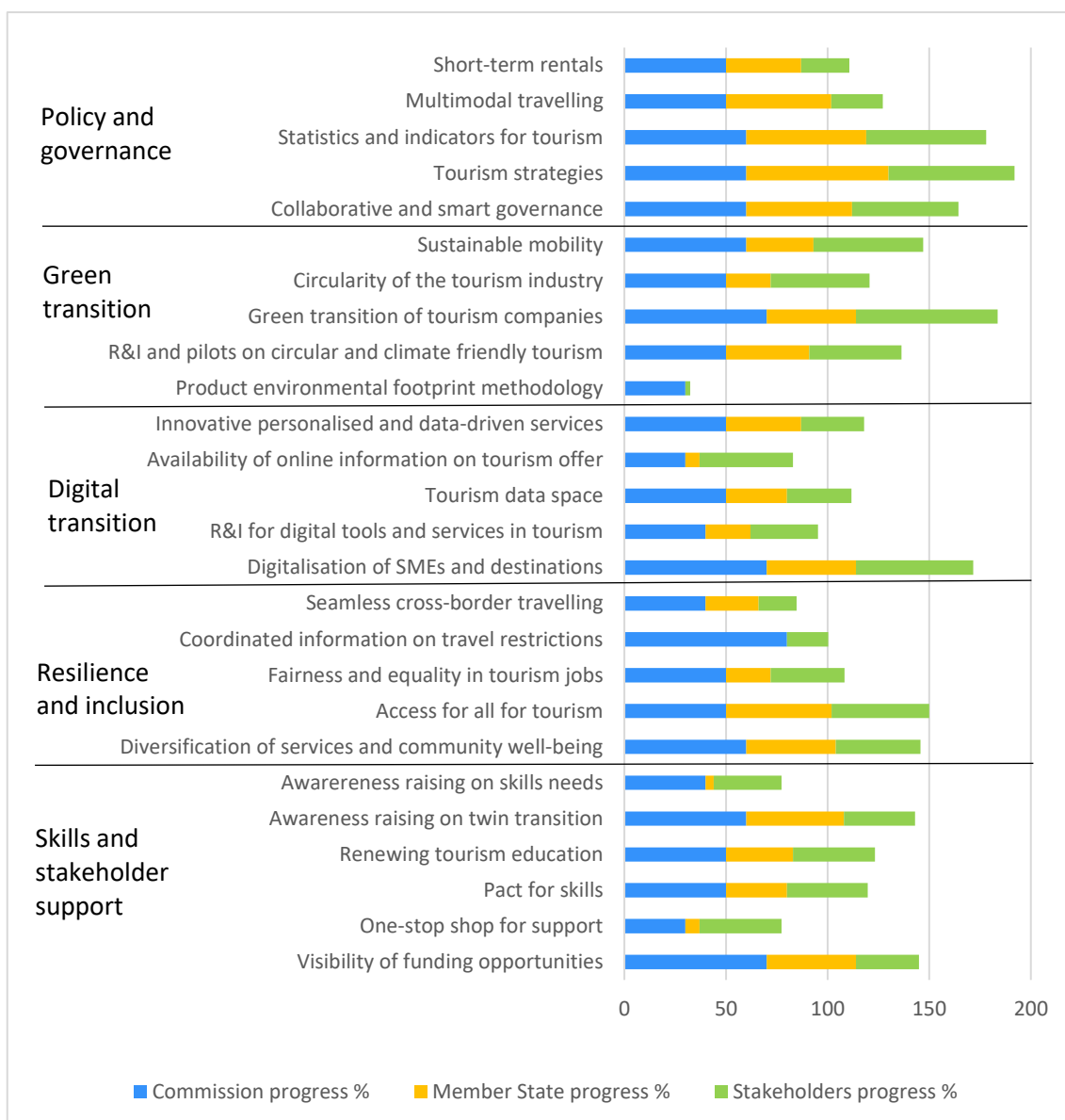


Figure 16: Sum of key groups' effort progress across transition pathway topics

Annex III: List of change indicators

These are the selected change indicators that make it possible to follow the development of elements relevant to each of the work areas of the transition pathway for tourism. The 2023 stock-taking exercise is setting up a baseline to be updated in the upcoming years.

Most of these indicators can be updated yearly based on the source indicated. In some cases, the data source used in the current stock-taking exercise is different from the envisaged future source, as support actions for the transition pathway follow-up are still being set up. Once in place, these support actions can provide new monitoring data.

Near-term targets are proposed for 2025, to give a closer point for concrete reflection with a view to building knowledge for the 3-yearly reporting to the Council on the progress made in implementing the EU Agenda for Tourism 2030. However, the overall transition perspective must remain long-term, towards climate-neutral and socially sustainable tourism by 2050, with a key milestone in 2030.

Indicators		Value in 2022 (2023)	Target for 2025	Source
Policy and governance				
	Number of Member States having established a single digital entry point for platforms to deliver data on short-term rentals	n/a, but 9 Member States with existing measures at national level	All Member States where STR share of all accommodation nights is greater than 10%	TAC reporting
	Number of Member States which make both static and dynamic MMTIS data accessible	14 Member States	20 Member States (on path towards all 27 Member States by 2028 following obligation set in Delegated regulation 2017/1926)	NAPCORE annual reports
	Participation of Member States in 3-yearly TSA data collection, number of Member States providing at least 32 indicators for tables 1-7	23 Member States participated, 11 provided at least 32 indicators (out of 42) for tables 1-7	25 Member States participating, 20 providing at least 32 indicators (out of 42) for tables 1-7	DG GROW desk research, Eurostat TSA reports

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	Member States reporting on tourism strategies updated 2022 or later which include economic, environmental and social sustainability	10 Member States	27 Member States	TAC reporting
	Cumulative diversity of Member State origins of the finalists in EU-level Smart Capitals and EDEN/Green Pioneer competitions	12 in 2022; 16 in 2023	24 (even progress per year)	GROW desk research
Green transition				
	Overnight trips made by train in the EU	140.1 million (vs. 108.6 million in 2015)	170 million (to support EU target to double high-speed rail traffic by 2030 compared to 2015)	Eurostat table tour_dem_ttrr
	Food waste from restaurants and food services per capita	12 kg/person (latest value for 2020 and 2021)	10.2 kg/person (reduction of 15% from 2020 value supporting EU objective to reduce food waste by 30% by 2030)	Eurostat table env_wasfw
	Number of EU tourist accommodation services, which have adopted reliable environmental schemes or labels (see indicator description from EU Tourism Dashboard)	5.652	8.000 (targeting strong acceleration, 800 new registrations per year)	EU Tourism Dashboard: Adoption of environmental labels and schemes
	Number of ongoing EU-funded R&I projects linking with environmentally sustainable tourism	112	200 (counting to include also other EU funding programmes than Horizon Europe)	CORDIS search for ongoing projects in 2022 with search words 'tourism AND (sustainability OR climate OR circularity)' / from 2024 onwards: T4T stakeholder support platform list of EU-funded R&I projects on sustainable tourism
	Existing product environmental footprint category rules and calculation support datasets for tourism services	No	Yes	DG GROW desk research
Digital transition				

Transition pathway for tourism: Taking stock of progress by 2023

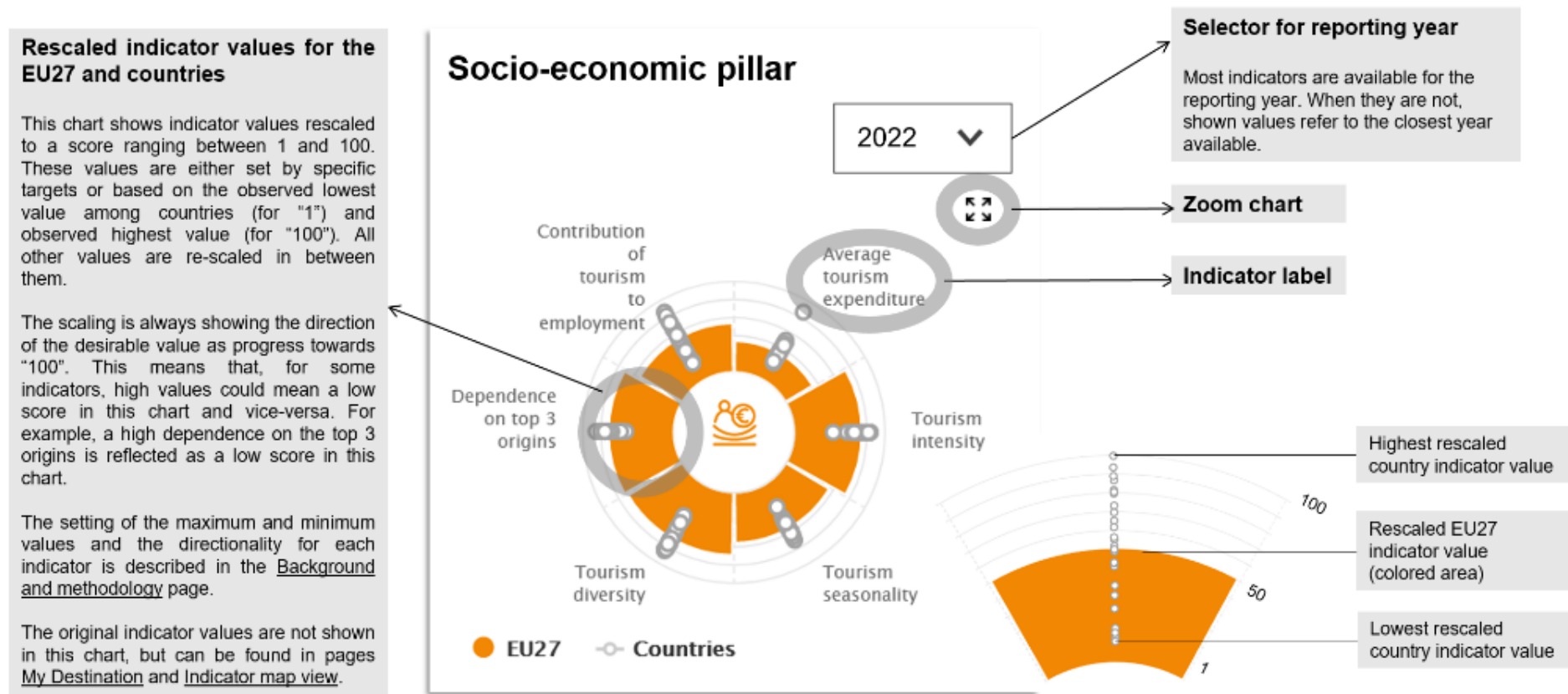
Take-up of one or more advanced technologies (cloud, AI, big data) by tourism companies	31.2% (survey conducted in 2023)	48% (on a path to reach 75% by 2030 in line with Digital Decade targets)	Annual EMI project survey of tourism SMEs
Share of EU tourism companies with a website	84% in big data analysis in 2023	90% (to support Digital Decade target of 90% of SMEs having at least basic digital intensity by 2030, starting with a website)	Annual EMI Tourism report
Number of tourism-related datasets provided by EU Member States at data.europa.eu	4969 (4 December 2023)	7669 (increase of 50 datasets per Member State per year)	Online query to data.europa.eu portal with keyword "tourism"
Number of ongoing EU-funded R&I projects linking with tourism and digital technologies	99	200 (including also other EU programmes than Horizon Europe)	CORDIS search for ongoing projects in 2022 with search words: "tourism AND (digital OR technology)" / from 2024 onwards: T4T platform list of EU-funded R&I projects on tourism and digital technologies
Share of accommodation and food enterprises having at least basic digital intensity	53.2% (100% - 46.8% of companies with very low level based on Eurostat)	70% (in line with the Digital Decade target of 90% of SMEs having at least basic digital intensity by 2030)	Eurostat table isoc_e_dii2
Resilience			
Number of nights spent by non-EU residents in EU accommodation establishments	418 million extra-EU visitor nights (calculation: visitors from any country – intra-EU)	700 million extra-EU visitor nights (return to 2019 level)	Eurostat table tour_occ_ninraw
Published educational material for crisis resilience including lessons learnt from COVID-19 measures and governance	No	Yes	DG GROW website and T4T online stakeholder support platform
Shares of men and women of the part-time workforce in selected tourism industries	Men 27.2% ; Women 72.8% (Q4-2022)	Men 36% Women 64% in Q4-2025 (progressing towards	Eurostat table tour_lfsq6r2

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			equal balance 50%/50% by 2030)	
	Share of EU citizens not participating in tourism (at least one overnight stay) for financial or health reasons	15.3% not participating for financial reasons, 8.0% for health reasons	Reducing share of both non-participation reasons	Eurostat table tour dem npage
	Tourism seasonality (proportion of nights in 3 busiest months of all tourism nights in a year)	45%	40% (lower value means more equally balanced tourism nights in all months)	EU Tourism Dashboard indicator tourism seasonality
Skills and stakeholder support				
	Participation of tourism workforce in upskilling or reskilling activities	56.000	120 000 (10% of the workforce in tourism industries – 12.1 million in 2022)	DG EMPL Pact for Skills annual survey report
	Number of participants in the open stakeholder events informing about the transition pathway	304 people (first year), 1415 in 2023	2000 (several events organised by the Commission including European Tourism Day and monthly webinars on the T4T online platform)	DG GROW event participant logs + T4T online platform event participation logs
	Number of Erasmus+ KA1 and KA2 activities with keyword 'tourism' labelled as 'good practice' per activity year	156 (search on 4 December 2023)	200 (increasing number of good quality tourism education development projects)	Erasmus+ programme website search with keyword "tourism", activity year 2022
	Number of established national/regional skills partnerships in tourism	3 in 2022, 6 in 2023	12 (aiming for even growth of 3 partnerships per year)	DG GROW desk research
	Monthly number of new content items/references made available on the stakeholder support platform to support 27 areas of the transition of EU tourism	Not applicable (platform to be launched in 2024)	50/month (including reports, projects, events, articles, news items, etc)	T4T platform monthly progress reports submitted to DG GROW
	Number of open tourism-related funding calls notified to stakeholders	68 open calls in 2022 notified through the Guide on EU funding for tourism	150 (EU calls + calls by Member States and regions notified through the T4T stakeholder platform)	' Guide on EU funding for tourism ' and EU funding and tenders portal , from 2024 onwards T4T platform reporting on tourism funding calls

Annex IV: Reading guide for EU Tourism Dashboard pillar index

The below chart explains how to read the EU Tourism Dashboard pillar index charts. Further information about the EU Tourism Dashboard’s background and methodology can be found at: [Background and methodology \(europa.eu\)](https://europa.eu)



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