



# Transition pathway for tourism: Taking stock of progress by 2024



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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 eight-month long [co-creation](#) process in 2021 and [published in February 2022](#). It identified 27 areas of action to help the European tourism community to:

- recover from the COVID-19 pandemic while meeting the changing demand of technically-savvy and increasingly environmentally and socially conscious consumers;
- contribute to the ambitious EU Green Deal and Digital Decade objectives; and
- build long-term resilience.

This is the second stocktaking report on the transition pathway following the publication in January 2024 of the [‘Transition Pathway for Tourism – Taking stock of progress by 2023,’](#) which is mentioned in the [Council conclusions on an EU Agenda for tourism 2030](#). A report to the Council on progress made towards both actions in the Transition pathway for tourism and the EU Agenda for Tourism 2030, as provided for in the Council conclusions, will be submitted by the end of 2025.

This second stocktaking report demonstrates that the co-creation process for developing the transition pathway and its key actions have inspired a significant number of stakeholders to take action. Compared to 2023, progress is shown among most stakeholder groups. However, certain issues and challenges faced by the EU tourism ecosystem which have not been fully taken into account by the key actions of the transition pathway, are emerging. Therefore this report also identifies the main emerging issues that should be included in future stocktaking reports.

Since February 2022, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW) has launched calls for pledges and commitments from stakeholders to support the transition pathway topic areas through specific actions and measurable targets. By August 2024, there were [529 published pledges](#) covering all topics identified in the transition pathway. Published commitments to supporting the pathway's objectives were collected from [240 organisations across 36 EU and non-EU countries](#).

Among the 27 key topic 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 statistics and indicators for tourism and developing comprehensive tourism strategies, but also on collaborative and smart governance. A total of 22 Member States have in place strategies that consider the economic, environmental and social sustainability of tourism. Nine Member States have strategies that are applicable until 2030



or beyond. NGOs and SMEs play an active role by collaborating with public authorities on strategy development and implementation, supported by EU legislation on, for example, short-term rentals and multimodal passenger mobility.

The **green transition** continues to be led by the action to support transition measures for tourism companies and SMEs. The topic continued to attract a high number of pledges (52) and the highest number of results reported by stakeholders. The most notable progress during 2024 has been the adoption of numerous legislative proposals under the European Green Deal, including the Nature Restoration Act, the Net-Zero Industry Act, and the Corporate Due Diligence Directive. Both the European Commission and Member States have reported significant progress in most action areas of the green transition, due to the adoption of numerous legal instruments and their implementation over the last year. More pledges have been received on these topics by stakeholders, but have not yet been completed, which is why progress by stakeholders appears to have not increased. This is precisely due to the increased number of pledges received that are considered as ‘in progress.’ The proposed change indicators remain the same as in 2023: number of tourists using the train, and the number of tourist accommodations certified with a third-party-verified environmental management scheme or ecological label.

The **digital transition** dimension remains slightly behind the green transition in terms of stakeholder pledges and reported Member States measures. The efforts of the Commission and Member States have increased in nearly all priority topics in the digital transition. They only remained at the same level for the Commission on the topic of research and innovation for digital services and tools. The Commission, however, launched the EU Tourism platform open to all tourism stakeholders, which is a major contribution to the digital transition under the stakeholder support dimension of the transition pathway.

Member States efforts have increased the most in the area of digitalisation of SMEs and destinations. Over 100 pledges have been received from stakeholders on the topics related to the digital transition, increasing the number of pledges that remain to be implemented, which results in progress appearing as decreasing. Nevertheless, the increased number of pledges demonstrates reinforced engagement to digitalisation topics. [The European Monitor of Industrial Ecosystems \(EMI\)](#) survey of tourism companies in 2024 indicates that the adoption of advanced digital technologies increased productivity up to 15%. The largest share of respondents witnessed an increase in productivity as a result of cloud computing followed by AI and big data. The proposed change indicators remain the same as in the 2023 stocktaking report: the level of basic digital intensity of SMEs as well as the available tourism-relevant datasets to support tourism innovation and monitoring. It is also important to mention the indicator on the [number of tourism-related datasets](#) provided by Member States, which is becoming of increasing importance for the EU tourism data space.

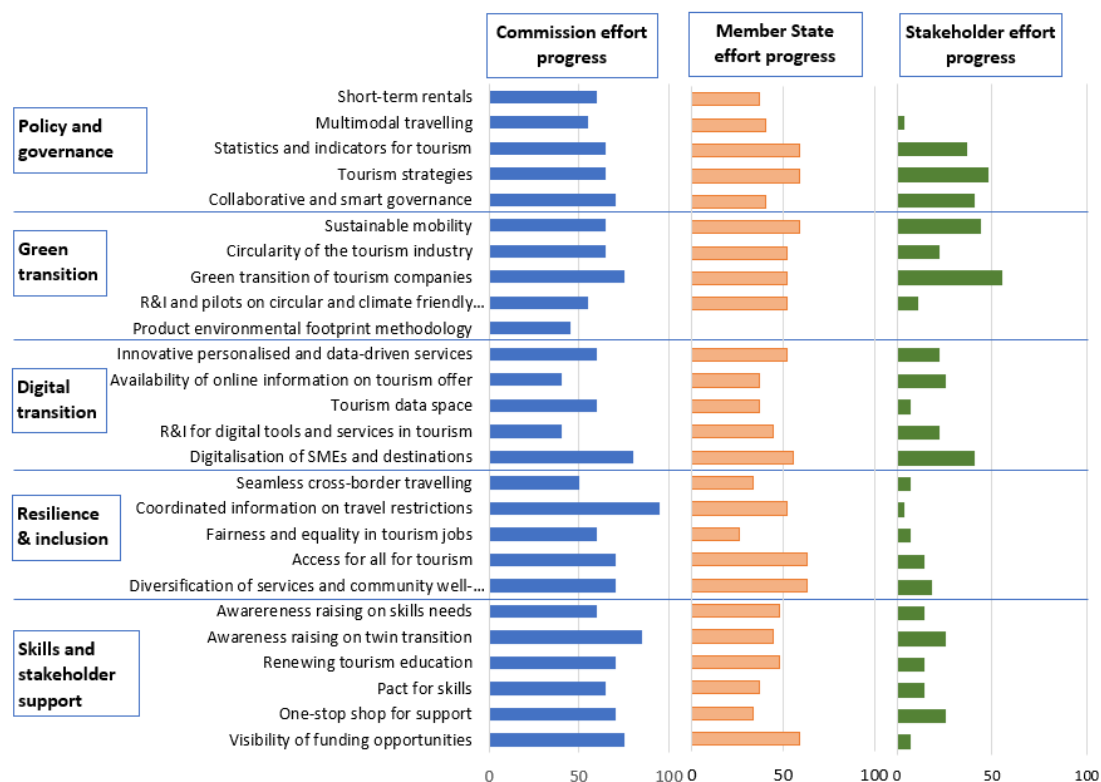
**Resilience and inclusion** actions have progressed, particularly on accessibility of tourism for all and diversification of tourism services and well-being of local residents. Progress by the Commission and Member States has increased for all topic areas, especially by the Commission in relation to coordinating information on travel restrictions and accessibility. Measures have also been taken by Member States in these areas. The number of pledges have increased to over 50 pledges, demonstrating stakeholder's engagement on the



resilience and inclusion priority topics. For example, several organisations are contributing to support specific types of tourism for diverse groups of travellers. Public authorities continue to support developments towards improved accessibility in tourism. Indicators for these topic areas remain consistent with those in the 2023 report, one of which is tourism intensity as the ratio of overnight visitors to residents, and tourism seasonality, which has fallen slightly compared to 2023.

The fifth dimension of the transition pathway for tourism, **skills and stakeholder support**, is a transversal dimension that helps enable the green and digital transitions and build resilience into the ecosystem. The need to raise awareness on the needs of the twin transition is critical, which is supported by the Commission, Member States and stakeholders. Progress was made in this area through the Commission's [tourism jobs and skills campaign](#) in 2024, as well as by the Resilience subgroup of the 'Together for EU Tourism' expert group through a dedicated webinar on the topic. Renewing tourism education, training for upskilling and reskilling of employees and job seekers is also progressing, not least through Erasmus+-funded programmes. The challenge remains to engage all Member States to develop local and regional skills-building mechanisms to meet the needs of future jobs in tourism. The EU Pact for Skills large-scale partnership in tourism aims to train 10% of the workforce annually, reaching up to [7.5 million people trained by 2030](#). This is only one of the change indicators under skills and stakeholder support that will continue to be followed, together with the number of national or regional tourism skills partnerships established, which today are present in nine Member States.

The second stocktaking report follows the same **mechanism for regular progress assessment** that was presented in the first stocktaking report. This involves a quantitative formula to evaluate effort and progress on each transition pathway topic for the key groups of actors: the Commission, Member States and tourism stakeholders that have presented a pledge to one or more topics of the pathway. While some of the transition pathway topics may have varying degrees of relevance for different groups of actors, this approach allows a systematic overview across the 27 transition pathway topics and provides an annual basis for comparison. The figure below summarises the effort and progress across the transition pathway topics and actor groups.



Overall, by August 2024, the [published pledges and commitments](#) demonstrate engagement of stakeholders from 26 Member States, together with 10 other countries (Albania, Bosnia and Herzegovina, Japan, Liechtenstein, Montenegro, North Macedonia, Norway, the United Kingdom, Switzerland and the United States). Already 154 organisations across 26 Member States have presented specific pledges for action, while 86 organisations made a general commitment to the transition pathway for tourism. Although in 2024 a [fifth round of pledges](#) was published, there remains a need for greater awareness of this inclusive call for action, and for wider support for the design of meaningful actions and targets. From the end of 2024, pledges and commitments will be collected via the Together for EU Tourism (T4T) [platform](#), which will allow for a more efficient assessment and faster publication of new pledges. Member States are also called upon to improve awareness at national and regional levels, and are encouraged to make concrete pledges of their own.

The largest share of stakeholder pledges (9.8%) concerns the green transition of tourism SMEs, which is also the area with the largest share of pledges reporting results. The next most common topics for pledges are the development of tourism strategies (8%) and improving statistics and indicators for tourism (7%). This percentage has marginally decreased compared to the first stocktaking period, as an increased number of pledges were received proportionally, also for other topics. SMEs and business associations are the most active organisations, representing 30% of all pledges.

Several Member State best practices and stakeholder pledges identify cross-cutting issues that either relate to some of the topics in the transition pathway or go beyond the identified topic areas. For example, climate change and extreme weather events, unbalanced tourism, and the well-being of local residents continue to gain in importance when it comes to tourism policy and the future of tourism. Some of these issues are highlighted in this

second stocktaking report under emerging issues, but will also be included and further developed in the Commission's forthcoming report to the Council on progress of the [EU Agenda for tourism 2030](#), following three years from the publication of the transition pathway for tourism.

As the essence of the transition pathway is to identify and share concrete actions with measurable targets in a collaborative way, effort is being made to help stakeholders define and share their actions and to get inspired by others' actions. The [Together for EU Tourism \(T4T\) expert group](#) is doing this through their thematic sub-groups on the green transition, digital transition, and resilience. In the autumn of 2024, the [T4T transition pathways stakeholder support platform](#) became operational, and is attracting stakeholders to this 'one-stop-shop' for tourism best practices, practical examples, and is acting as a forum for real-time information exchange. Together these measures are helping to accelerate the EU's tourism transition by bringing together stakeholders for the sharing of practices that are inspiring and practical to implement for all types of tourism actors across the EU.

This second stocktaking report will contribute to building knowledge for the report after 2025 to the Council, to be submitted every three years, on the progress of the EU Agenda for Tourism 2030, as mentioned above. A comprehensive study to be carried out in 2025 will support this report and help to assess how objectives and action areas of the transition pathway and EU Agenda could be updated, in order to effectively advance towards a sustainable, competitive, responsible and resilient EU tourism sector that takes into account a changing world.

As with the first stocktaking report, it can be concluded that all work areas are progressing and should continue to be supported. Work will continue in 2025 on all 27 transition pathway action topics and focus should be given to:

**accelerating the digital transition in all its aspects:** digital skills, basic and advanced technology adoption and facilitation of data sharing in particular will be a priority. The digital transition subgroup of the T4T expert group plan to focus on short-term rental and data sharing in 2025, as well as on multimodal ticketing, digital solutions for overtourism, and artificial intelligence. The [EU digital innovation hubs](#) and the data sharing test case for the development of the [Common European Data Space for Tourism](#) will help to support this acceleration. The establishment of a [European Digital Infrastructure Consortium](#) (EDIC) continued to be crucial for this project.

**promoting a resilient and competitive green transition while ensuring the well-being of local residents:** with a new Commission mandate for a sustainable transport and tourism, decarbonisation of transport modes will generate increased visibility for the tourism sector. The green transition subgroup of the T4T expert group intend to focus on sustainable destination management and regenerative tourism, decarbonisation and competitiveness of the EU tourism sector, as well as solutions for overtourism, balancing tourism with environmental stewardship in their work plan for 2025. Other issues such as water resilience and biodiversity will also be important.

**boosting investment in upskilling and reskilling the tourism workforce**, while gaining a better understanding of where the skills gaps lie and to what extent and where shortages exist. The [EU Pact for Skills large-scale partnership for tourism](#), as well as the National Skills partnerships in place, and [Erasmus+-funding for cooperation partnerships](#) will continue to provide key support for this, while ensuring that stakeholders at local and regional levels are mobilised and trained on the ground. The Commission President's announcement to establish a 'Union of Skills' will give skills an even greater prominence in this next mandate.

**increasing collaboration and synergies between actors** with common interests and matching organisations with relevant knowledge. Cooperation and knowledge exchange is already taking place through the [T4T stakeholder expert group](#) and its thematic subgroups and will continue to work on topics under the green transition, digital transition and resilience/inclusions/skills in the coming years. The [T4T stakeholder platform](#) became operational in 2024 and is ramping up content and membership. The Commission also launched a [project to develop best practice exchange and a twinning mechanism between destinations](#). Frequent open stakeholder events organised by the Commission also contribute to better information sharing and funding opportunities for tourism-related projects.

## 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
EUSPA	EU Agency for the Space Programme
GTLD	Generic Top-Level Domains
MMTIS	Multimodal travel information services
NAP	National access point/ NAPCORE
NGO	Non-governmental organisation
PEF	Product environmental footprint
PEFCR	Product environmental footprint category rules
PTD	Passenger Travel Directive
R&I	Research and innovation
RIS3	Smart specialisation strategies
SDG	Sustainable Development Goals
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)
UN Tourism	United Nations World Tourism Organisation specialised 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 faced 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 <sup>(1)</sup> is a complex and diversified ecosystem composed of several economic sectors. In 2023, it included over 4.36 million companies <sup>(2)</sup>, and the 2023 SME review suggests that over 92% were microenterprises <sup>(3)</sup>. 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 to actively participate in this collaborative process.

**Table 1: Tourism ecosystem key sectors**

NACE (rev.2)	Description	% of sector
1149	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

<sup>(1)</sup> As defined and weighted for the EU Tourism Ecosystem in the context of the Annual Single Market Report 2021 ([eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52021SC0351](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52021SC0351), page 209).

<sup>(2)</sup> [DG GROW dashboard](#)

<sup>(3)</sup> [SME performance review Annual Report 2023/2024](#)



1149	Land transport and transport via pipeline	45
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

## 1.2. 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, [losing 500 million EUR of gross value added daily in 2020 when compared to 2019](#).

During 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 and already exceeded in the accommodation and food services sector, which employed approximately 9.3 million people in Q1/2024, while it was 9.0 million in Q1/2019. However, the recovery is continuing in the air transport and travel agency sectors, which in Q1/2024 were still below Q1/2019 employment figures.

Eurostat data shows that nights spent at EU tourist accommodation have been constantly reaching new records since 2023, with [453 million nights spent at tourist accommodation establishments in the first quarter of 2024](#), showing a 6.6% increase from the previous year, with international visitors contributing to this increase more strongly than domestic tourism (which had already recuperated earlier). In 2019, there were 428 million nights during the first quarter. Platforms such as Airbnb, Booking, Expedia etc. recorded almost 124 million nights during the first quarter of 2024.

However, the recovery remains fragile, as tourism in Member States is suffering from the effects of Russia's war of aggression against Ukraine, inflation, increased prices and extreme weather events. The number of international (including other EU countries) overnight visitors remains below 2019 in countries bordering Ukraine and Russia, and in those where Russia was an important source market.

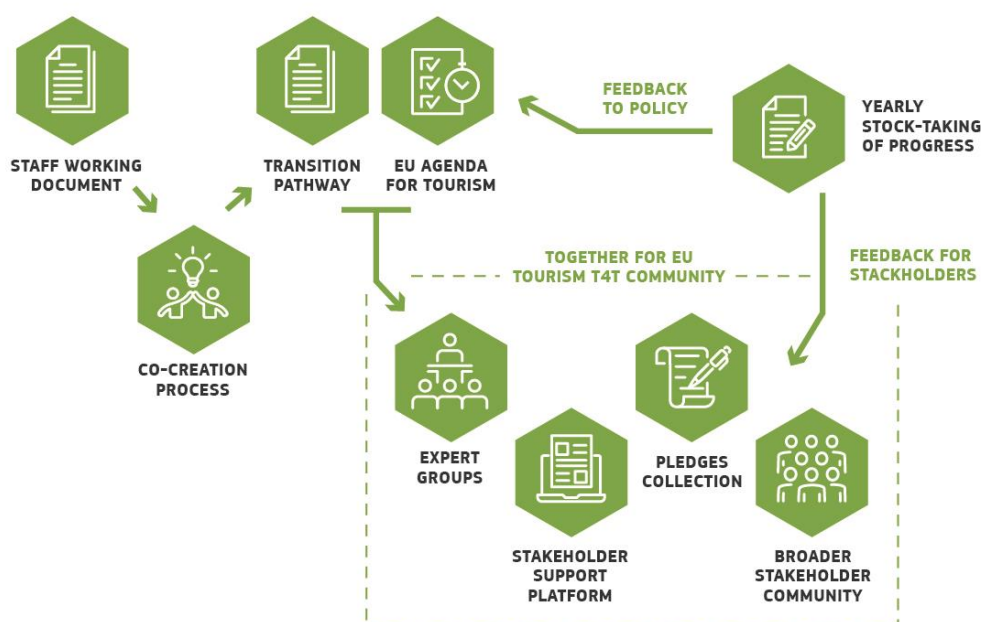
The key objective of the transition pathway to contribute to a more strategic, competitive, sustainable and resilient development of EU tourism, remains relevant. EU countries need to work on their tourism ecosystems to take into account changes in tourism demand, the need to respect biodiversity, natural ecosystems and resources, cultural heritage including the restoration and revitalisation of monuments and the conservation of natural habitats. The innovative potential of digital developments, while safeguarding the long-term well-being of local communities as key factors for ensuring attractive tourism destinations and sustainable experiences should also be taken into account.

### 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 eight-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 August 2024, there were 529 pledges from public and private stakeholders, and 241 organisations from 26 EU Member States and 10 other 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 has been created to facilitate access to resources, information, and collaborations.



**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 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 detailed 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.

EU Agenda for Tourism 2030	Transition pathway for tourism	
Enabling policy framework and governance	Topic 1: Short-term rentals Topic 2: Multimodal travelling Topic 3: Tourism statistics and indicators	Topic 4: Tourism strategies Topic 5: Collaborative and smart destination governance
Green transition	Topic 6: Sustainable mobility Topic 7: Circularity of tourism services Topic 8: Greening of tourism companies	Topic 12: R&I and pilots for circular and climate-friendly tourism Topic 13: Product environmental footprint methodology for tourism
Digital transition	Topic 9: Innovative & data-driven services Topic 10: Availability of online information Topic 14: Common EU data space for tourism	Topic 15: R&I for digital services Topic 16: Digitalisation of tourism SMEs and destinations
Resilience and inclusion	Topic 17: Seamless cross-border travel Topic 18: Coordinated information on travel restrictions Topic 24: Fair and equal tourism jobs	Topic 25: Access for all for tourism Topic 26: Diversification of tourism services and well-being of communities
Skills and support for transition	Topic 11: Information platform for SMEs Topic 19: Awareness of new skills needs Topic 20: Awareness of changes in tourism demand and need for twin transition Topic 21: Developing tourism education	Topic 22: Pact for skills in tourism Topic 23: One-stop-shop for learning, best practices and networking Topic 27: Visibility of funding opportunities for tourism

Figure 2: Interlinkages between EU Agenda and Transition Pathway

## 1.5. Stocktaking approach and sources

This stocktaking builds upon a variety of information sources and inputs, including:

- pledge content analysis;
- 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 interservice discussions;
- [European Monitor of Industrial Ecosystems \(EMI\) project – EMI tourism report 2024](#);
- 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 2024. 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:

1. readers interested in a quick overview of the transition pathway for tourism’s progress (focusing on the executive summary and Annex II);
2. readers looking for information on progress and examples relating to specific transition pathway for tourism topics (selecting topic-specific sections);
3. 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 aims to describe elements of Transition pathway implementation and progress in a systematic manner year-on-year, in order to build evidence for the three-yearly reporting to the Council on the EU Agenda for Tourism 2030, planned for the end of 2025.

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:

1. policy and governance;
2. green transition;
3. digital transition;
4. resilience and inclusion;
5. 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), change indicators with values for previous and current

years (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 formulas.

**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 already been adopted, 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. If all the named specific actions and related support measures have been fully implemented during 2022-2025, the action may reach 100%	0	100
Member States	Share of Member States taking measures based on reporting through TAC or by having 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 ‘effort progress on transition pathway topics’ assesses progress towards expected specific outputs, 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 area or work. Annex III provides a list of these change indicators for all transition topics.

The reader might notice that the horizontal boxes figure for each topic that display the percentage of pledges that have been completed or show results is in some cases lower than the progress reported in the [2023 stocktaking report](#). This is due to the fact that the [5th round of published pledges](#) from August 2024 contains many new pledges that are categorised as ‘in progress’, to be consistent with the method followed in 2023. This explains why the percentage of completed pledges or with results has decreased significantly for several action topics.

## 2.1. Policy and governance

In line with the [Treaty of the Functioning of the European Union](#) (TFEU), the EU’s powers in tourism policy (Article 195 of TFEU) lies in complementing 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, following 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’ 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 and a single digital booking and ticketing system, sustainable 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 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. The decision of Commission President Von der Leyen to create a dedicated portfolio entitled ‘Sustainable Transport and Tourism’ demonstrates the increased political importance and visibility tourism and the visitor economy is being given at EU level.

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 transition pathway co-creation process as key elements to the overall governance of tourism.

### 2.1.1. Short-term rentals

#### Topic 1 related actions in transition pathway and EU Agenda 2030

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

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 2 750 million nights (which also can include STR accommodation providers with over 10 bed places). [In 2023, almost 719 million nights were booked via collaborative economy platforms – an increase of more than 20%](#) In just the first quarter of 2024, almost 124 million nights were spent in short-stay accommodation according to

collaborative economy platforms, an increase of 28.3% compared with the first quarter of 2023. The need for 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:** in March 2024, Regulation (EU) 2024/1028 on data collection and sharing relating to short-term rental has been adopted by the co-legislator. The new rules are expected to come into application in May 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, country of residence of the guests 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. On 12 December 2024, the Commission organised and chaired the first meeting of the Single Digital Entry Point Coordination Group composed of Member States, which is supposed to lead the implementation of the Regulation.

**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 seven Member States, while nine consider it a priority. There are nine Member States that already have measures in place regarding STRs, and four 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.

#### Member State example: Croatia

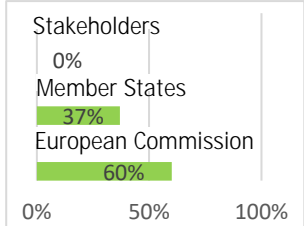
Croatia was implementing the project Croatian Digital Tourism – eTourism within which the electronic systems TuStart and TuRegistar were established. TuStart is an electronic system for registration and starting a business in the field of tourism and hospitality, which replaces the analogue registration and record-keeping processes. TuRegistar is a unique electronic system that contains interoperable data on catering and tourism service providers and facilities, travel agencies, tourist guides, nautical tourism vessels, nautical tourism ports and other types of facilities that provide mooring and accommodation services, rent-a-car service providers and tourist boards. In order to encourage further development of tourism and hospitality services in the Republic of Croatia and data sharing for STR registration, certain upgrades for data exchange will be needed.

### Stakeholder action: key figures for transition pathway topic 1 pledges:

6 pledges	3 Member States	5 organisation types	0% completed/ with results
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Stakeholder action is dependent on operating context and objectives; including:

- 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;
- a network of organisations committing to providing informational resources and guidance to its members on short-term rentals.

Progress indicators for topic 1 by 2024 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	
	Base value in 2022	n/a, but 9 Member States with existing measures at national level
	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 adopted 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. The regulation entered into force in March 2024. The revised MMTIS makes it mandatory for data holders to make dynamic information accessible via the NAPs. Under the revision, passengers will also be able to find real-time information on delays or cancellation of their plane, ferry, or transport-on-demand service, and where they can park their bike, scooter or car. 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 included in the TAC reporting on implemented measures in the latest reporting period. [NAPCORE's fourth report](#) on NAP data availability provides a detailed overview of the different categories of multimodal data accessible through NAPs. It shows that already in 2022, 24 Member States had a fully operational NAP to make MMTIS information accessible. Sixteen of them are already making accessible various sets of static and dynamic MMTIS data. Based on the reporting collected from Member States, supporting multimodal mobility is considered a challenge in 8 Member States, while 6 consider it a priority. There are 11 Member States that already have measures in place and 6 have published shareable [good practices](#) through TAC reporting.

#### **Member State example: Austria**

The federal state of Salzburg will introduce – from 1 July 2025 – a mobility tax for tourists, which will be charged on every overnight stay. In return, guests will be able to use all public transport in Salzburg for free. In its initial phase until 2027, the tax will amount to 0.50 EUR and afterwards 1.10 EUR per day. The income from the mobility tax will be used to improve the public mobility offer for tourism (e.g. better connections, new lines).

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

8 pledges	4 Member States	6 organisation types	13% completed/ with results
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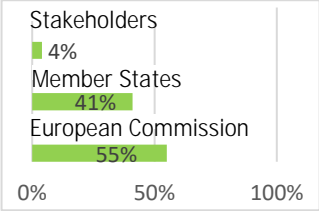
Stakeholder organisations are supporting multimodality developments and also considering visitor traffic and congestion management under this topic with pledge actions such as:

- 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 (see example box below);
- 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 promoting and supporting the integration of cycling with public transport;
- a business association organising 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 the Catalan government

‘Smart Catalunya Card is a destination SuperApp that offers functionalities to support and improve the visitor experience in Catalonia, among which stands out the future T-Mobilitat Turística (T-Tourism Mobility), a product to be developed jointly with the Department of Territory and the ATM (the Metropolitan Transport Authority) by the end of September 2024.

The aim is to facilitate the deconcentration of visitor flows by taking advantage of the public transport network and its integrated tariff system, making the visitor experience in our region more sustainable. Apart from T-Mobility, the SuperApp will also offer functionalities that will stimulate upselling and cross-selling, as well as loyalty based on a token system developed with blockchain technology.’

Progress indicators for topic 2 by 2024 based on reported efforts	Change indicator: Number of Member States which make both static and dynamic MMTIS data accessible	
	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 <a href="#">Delegated regulation 2017/1926</a> )
	Source	<a href="#">NAPCORE</a> 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
Revising harmonised data collection rules on tourism statistics to include elements on economic, social and environmental sustainability	Revised EU framework for tourism statistics which includes indicators on economic, environmental and social impacts of tourism by 2030
Improving access to data for producing official statistics	Official statistics production benefiting also from privately collected data, in compliance with data protection rules and legitimate commercial interests
Including key sustainability indicators on destination level to the harmonised tourism data collection framework	EU Tourism Dashboard publicly available and used
Implementing the EU Tourism Dashboard to support follow-up of environmental, digital and socio-economic aspects of tourism	
EU Agenda 2030: actions	Expected outputs
European Statistical System actors to revise harmonised data collection rules on tourism statistics	Revised EU framework for tourism statistics which includes indicators on the economic, environmental and social impacts of tourism by 2030.
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	EU Tourism Dashboard publicly offering indicators on the green and digital transition and socio-economic resilience at national, regional and local levels
The Commission to implement the EU Tourism Dashboard to support the following up of environmental, digital and socio-economic aspects of tourism	

**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 seven countries (Croatia, Greece, Italy, Malta, Slovenia, Spain and Portugal). 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. Additionally, in December 2023 the Commission launched the [D3Hub](#), an EU Competence Centre which acts as a reference point for destinations to better understand the potential, methodologies, opportunities and trends in the access and management of data. D3Hub will ensure synergies with other data-related initiatives at EU level, such as those mentioned above, as well as SMP calls, [RESTWithEU](#), and the common European tourism data space (topics 9 and 14).

In Q1 2024, the green, digital and resilience sub-groups of the ‘Together for EU Tourism’ expert group set up by the Commission in 2023, organised online webinars and prepared recommendations to Member States and the Commission on tourism indicators. The green transition sub-group focused on measuring the environmental impacts of products and services (green labels, indicators), while the [digital transition sub-group](#) addressed new data sources and the resilience sub-group addressed regulation in the context of tourism indicators.

**Member States action:** statistics and measurements for tourism are considered a priority in 15 Member States. There are 13 Member States with specific measures in place and 12 have published shareable [good practices](#) through TAC reporting. A total of 7 national actors have made pledges under this topic (Italy, Lithuania, Slovakia, Portugal, Slovenia, Finland, France).

#### Member State example: Finland

Visit Finland, in collaboration with the tourism sector, developed the Sustainable Travel Finland (STF) programme to help travel companies and regions achieve the STF label. This programme includes national indicators for sustainable tourism, providing data at various levels to inform future national tourism strategy targets.

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

38 pledges	16 Member States	11 organisation types	26% 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; and an SME introducing key performance indicators and indexes that measure the social sustainability and inclusion of the LGTBQ+ community within the tourism industry.
- a large company offering VAT refund services committing to share travel related data with Member States (see box below);



- NGOs and international organisations supporting continuous monitoring and development of tourism impact indicators based on the Statistical Framework for Measuring the Sustainability of Tourism;
- investment funds for SMEs and companies in the tech travel sector in Europe.

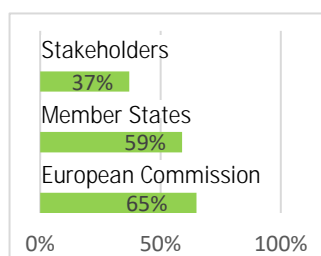
Although not a specific pledge to the transition pathway for tourism, it is important to note that statistical work on tourism is carried out at international level, for example, the UN Tourism Data Dashboard as well as the World Tourism Barometer by UN Tourism provide monthly updates on international tourist arrivals, receipts and expenditure by country, subregion and region at global level. Furthermore, the UN Tourism Statistics Database provides over 150 key tourism statistics collected on: inbound, outbound and domestic tourism, tourism industries, employment in tourism, trade-based indicators, SDG indicators, and Tourism GDP and value added.

#### Example pledge with reported progress by Global Blue

‘Global Blue is a VAT Refund operator present in all EU Member States. We provide technology solutions to facilitate the tax-free shopping process for European merchants and non-EU travellers in the EU. Through our services (and always in compliance with data protection rules), we are able to collect a wealth of data including traveller country of origin, countries of travel destination, shopping and travel habits. We are available to establish bilateral/multilateral agreements to share this data on a quarterly basis with relevant stakeholders to help inform their official statistics. This data will ultimately help inform official tourism statistics and indicators on the economic impact of international tourism to the EU. We hope to establish by 2025 data sharing practices in several MS which have contributed to improving their official tourism statistics.’

Progress indicators for topic 3 by 2024 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 <a href="#">TSA reports</a>

## 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	All Member States or their key tourism regions to have comprehensive tourism strategies by 2025
Guidance and best practice exchange for strategy development on national, regional and local level	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](#), published the [4th report on their implementation](#) in December 2022 and is working on the fifth report, expected to be published at the start of 2025. All the macro-regional strategies have selected tourism as a priority area and have developed targeted objectives on sustainable tourism.

The T4T Expert Group (Resilience sub-group) addressed this specific topic in Q2 of 2024, holding a well-attended webinar looking at social sustainability and rural tourism strategies. The [webinar](#) recording and outcomes of the discussion are published and available on the T4T platform.

Urban destinations are benefiting from support under Urban Agenda for the EU. Sustainable and innovative tourism in urban destinations is supported by the [second EU-IA call for proposals](#), under which seven sustainable tourism projects in the municipalities of Coimbra, Copenhagen, Elliniko-Argyroupoli, Krakow, Prato, Ravenna and Valencia were selected. These cities will benefit from up to 5 million EUR each to test urban innovative solutions and will start implementing the project as of 2025, thus contributing to the objectives of the Transition Pathway of Tourism. The Partnership on Sustainable Tourism, under the Urban Agenda for the EU, has progressed: the draft action plan was open for public consultation in June-July 2024 and is expected to be adopted by the end of 2024, with the implementation to start in 2025.

At international level, UN Tourism continues to support tourism strategies and launched the Self-Assessment Tool to Assist Rural [Destinations](#) (STAR), a cutting-edge online self-

assessment tool that empowers rural destinations in UN Tourism Member States to evaluate and enhance their tourism strategies. STAR provides a comprehensive framework for local authorities to assess and improve their policies and actions aligning with referenced best practices for sustainable development.

**Member States action:** through TAC reporting (to which 24 Member States responded), 21 Member States indicated that they had national strategies, 16 that they had regional strategies and 9 that they had thematic strategies regarding tourism. Many Member States have more than one type of tourism strategy in place. A total of 22 Member States report covering the economic, environmental and social sustainability of tourism in their strategies, and 9 Member States cover the period till 2030 (or beyond). Asked to report on the development of sustainable destination management strategies, 15 Member States replied that this is a priority (15 being the highest number across all reported action areas). 12 have measures in place and 6 reported their [sharable practices](#) via the TAC report. 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 tourism strategies:

<a href="#">Austria</a>	<a href="#">Greece</a>
<a href="#">Bulgaria</a>	<a href="#">Hungary</a>
<a href="#">Croatia</a>	<a href="#">Luxembourg</a>
<a href="#">Czechia</a>	<a href="#">Netherlands</a>
<a href="#">Denmark</a>	<a href="#">Portugal</a>
<a href="#">Estonia</a>	<a href="#">Slovenia</a>
<a href="#">Finland</a>	<a href="#">Spain</a>

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

43 pledges	15 Member States	11 organisation types	30% 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;
- 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; and proposing to enhance strategic

planning to promote sustainable tourism development and long-term, holistic growth, with the aim of improving the quality of life for residents;

- 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;
- a network of organisations advancing regional tourism by facilitating experience exchange, leveraging sustainable tourism projects, aligning with climate action, and supporting Blue Economy initiatives and policy integration (see example box below);
- an international organisation providing yearly updated guidance and recommendations for DMOs to develop and follow their strategies.

#### Example pledge with reported progress by the Conference of the Peripheral Maritime Regions of Europe

‘With 2025 as the horizon, CPMR will keep:

- boosting the exchange of experiences between its member regions in different Geographical Commissions on comprehensive tourism strategies via its Working Groups and Task Forces and high-level events (e.g. linked to EP intergroup SEARICA), contributing to the multilevel governance of tourism policies and the identification of best practices.

- capitalising projects results on management and planning of sustainable tourism in maritime coastal regions and islands, also tackling specific issues such as de-seasonalisation of tourism, mass tourism in sensitive areas, ecotourism governance, among others (e.g. Co-Evolve, MedCoast4BlueGrowth, Mitomed+, Wintermed, Destimed plus, Herit Data, Best Med, Smart Med, Reboot Med, CulTourE4Youth Project)...

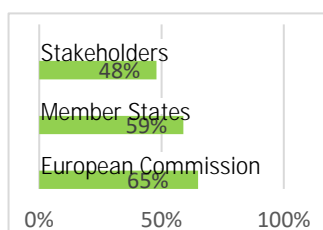
- Linking up its efforts and actions with the ‘Glasgow Declaration’ initiative on Climate action on tourism and its pathways (e.g. collaboration and financing).

Some of the concrete actions our organisation will contribute to by 2025 are:

- to encourage public-private partnership co- defining Blue Economy Action Plans for the Recovery of the tourism sector, and to incubate, accelerate and test new eco/blue economy tourism packages in 10 pilot areas in 6 WestMed countries: MA, TN, MU, ES, IT and FR

- to support the enhancement and animation of the new Sustainable Tourism Community (all types of stakeholders) of the new Euro-Med Interreg programme as well as the mainstreaming of relevant project results into public policies in connection with the work that will be developed by the Institutional Dialogue Project.’

Progress indicators for topic 4 by 2024 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 European Capital of [Smart Tourism Awards](#) for large destinations and until 2022 provided EDEN awards for smaller destinations. From 2023, the latter was integrated in the European Capital of Smart Tourism competition, and renamed [European Green Pioneer of Smart Tourism](#). These awards invite destinations to showcase their achievements in smart and sustainable destination management relying on collaborative and data-based elements and network with other destinations, thereby serving as inspiration and catalyst for innovation.

The Commission launched [a pilot project initiated by the European Parliament on crisis management and governance in tourism](#) in 2022 which concluded at the end of 2024. It has delivered educational material on the lessons learnt from the COVID-19 pandemic and other crises affecting tourism in 2024. Aiming to help tourism destination develop resilience and crisis governance, the project worked side-by-side with destinations and cross-border professional associations, with selected tourism experts, providing advisory services to enhance these organisations capacity for crisis prevention, management, and mitigation, leveraging on the developed guidance and collaboration materials. The learning materials and recommendations from the project are now published on the Transition Pathways Platform. Another study concluded in 2023 was an EU guide on data for tourism destinations.

**Member State action:** supporting collaborative destination governance models was considered a priority in 7 Member States, and 10 Member States have put in place measures to support these models. In total 10 Member States shared [best practices](#) relating to destination management through TAC reporting. In addition, three Member States (Estonia, Slovak Republic, Slovenia) made pledges on development of collaborative destination governance.

### Member State example: Slovenia

The Green Karst brand of the Primorsko-notranjska region embodies the area's commitment to sustainable development, emphasising environmental preservation, tradition, and future-oriented growth. This initiative includes restructuring the economy to minimise environmental impacts, promoting social cohesion, sustainable resource management, and enhancing the forestry and timber industries. It also focuses on responsible tourism, environmental infrastructure, energy efficiency, and local self-sufficiency.

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

29 pledges	11 Member States	9 organisation types	38% completed/ with results
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Stakeholders' pledged actions include:

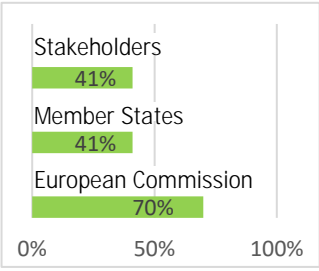
- regional administrations taking action to establish governance models with regular collaboration with stakeholders and digital platforms which provide support for the monitoring of data and showcasing offer of destinations;
- DMOs at regional level establishing and reporting on implementation of collaborative governance approaches, 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 (see example box);
- 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 EUROPARC Federation

'ACTION: To create and implement a Forum of stakeholders, involving private and public local actors of tourism and of nature conservation, in all European Protected Areas certified by EUROPARC as Sustainable Destinations in the framework of the EUROPARC Programme 'Charter of Sustainable Tourism in Protected Areas - ECST'. The Forum will be coordinated by the Protected Area management body. [...]

OUTPUT: 100 Protected Areas have an active Forum in 2024, organised following the local needs and characteristics. The Forum participates in the identification and realisation of ECST strategy and action plan. The Forum is regularly internally monitored and revised each 5 years, after the evaluation provided by EUROPARC verifiers.'

Reported progress: 87 Protected Areas that have an active forum involving local municipalities, conservation and community organisations and representatives of the tourism businesses.

Progress indicators for topic 5 by 2024 based on reported efforts	Change indicator: Cumulative diversity of Member State origins of the finalists in European Smart Capitals and 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, and strongly depends on the direction set in the national and regional strategies as well as governance models.

The most notable progress during 2024 has been the adoption of numerous legislative initiatives under the European Green Deal. As required under the Climate Law, the Commission recommended in February 2024 an additional intermediate target of 90% less emissions by 2040.

The [Nature Restoration Law](#), adopted in June 2024, establishes binding targets at the EU level: at least 20% of the EU’s land and sea areas to be restored by 2030. It aims to create healthier biodiversity, mitigate climate change and the effects of natural disasters, all of which are crucial for sustainable and resilient tourism economy, while contributing to its targets.

In May 2024, the Council adopted the **Net-Zero Industry Act**, facilitating the conditions for investments in green technologies, covering also sustainable aviation and maritime alternative fuels technologies.

The revised **Directive on the Energy performance of buildings**, adopted by the Council in April 2024, introducing minimum energy performance standards and setting targets (by 2030 all new buildings should be zero-emission buildings, and by 2050 the EU’s building stock should be transformed into zero-emission building stock).

In March 2024, the Council and the European Parliament reached a provisional agreement on a proposal for a regulation on **Packaging and packaging waste**, which will significantly impact the hospitality sector by setting restrictions on single-use packaging as well as refill and reuse obligations for the take-away sector.

Revision of the **Waste Framework Directive** progressed with the adoption of the Council position in June 2024, setting targets to reduce food waste (30% per head in retail, restaurants, food services and households).



EU rules concerning **corporate sustainability reporting** entered into force in January 2024. Large companies and listed SMEs will have to report on environmental matters, human rights, anti-corruption measures and diversity issues. This is complemented by the corporate due diligence [Directive](#), which requires large companies to identify and address adverse human rights impacts (such as child labour) and environmental impacts (such as pollution) in their own operations and their supply chain, which will come into force gradually as from 2027.

The **Directive to empower consumers for the green transition** was adopted in February 2024, reinforcing consumers' right to information and banning sustainability labels not based on certification schemes or not established by public authorities and banning generic environmental claims unless excellent environmental performance is demonstrated through the EU Ecolabel or other officially recognised EN ISO 14024 ecolabelling schemes in the Member States. This Directive will be complemented by the upcoming **Directive on green claims**, currently under consideration by the Council and the European Parliament.

The Commission continued supporting the green transition of the tourism industry and destinations through the support under the Single Market Programme (implementing projects under the 2023 call 'Transitioning to a more sustainable and resilient ecosystem – empowering tourism SMEs'), pilot project (Supporting sustainability and resilience of EU tourism destinations), as well as the Partnership on Sustainable Tourism under the Urban Agenda for the EU.

The Partnership on Sustainable Tourism, under the Urban Agenda for the EU, has agreed on dedicated actions to prepare guidelines for climate-friendly and resilient urban destinations, to support destinations by enabling the use of sustainability certifications for SMEs, and to help cities diversify their tourism offer. 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 an estimate of the average amount of CO<sub>2</sub> emitted per air passenger per reporting country.

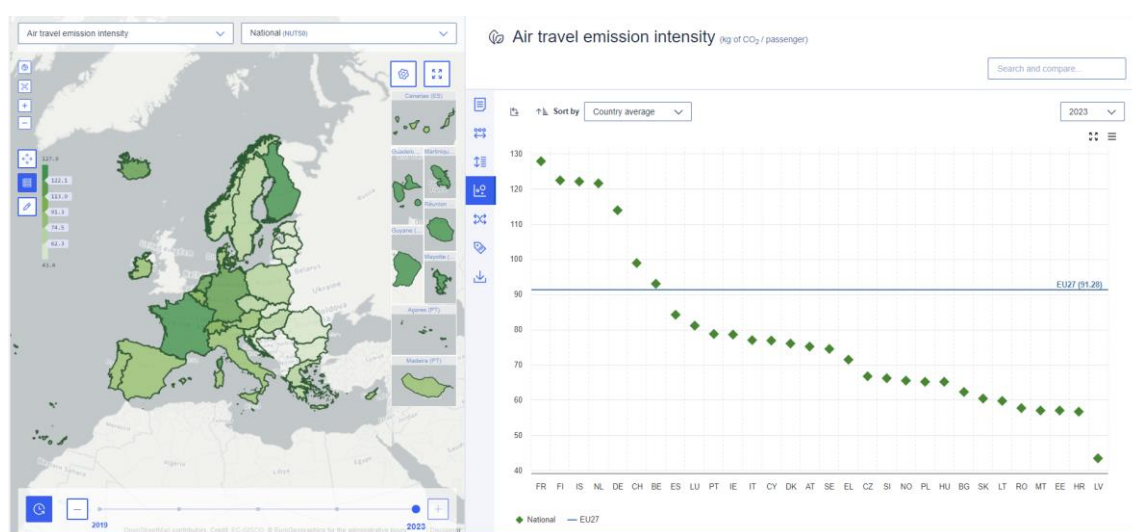


Figure 3: Air travel emission intensity in 2023 ([EU Tourism Dashboard](#))

Furthermore, the [2024 EMI Tourism report](#) of the European Monitor of Industrial Ecosystems (EMI) project indicates only limited improvements in tourism's environmental impact, with some areas showing deterioration compared to pre-pandemic levels. Companies within the tourism ecosystem have been actively implementing measures to enhance resource efficiency, but limited progress has been made. When comparing values from 2021 to 2024, only limited progress is observed in areas such as waste reduction, recycling, sustainable design and the adoption of renewable energy.

<b>Environmental measures</b>	<b>Share of adoption (2021)</b>	<b>Share of adoption (2024)</b>
Minimising waste	71%	73%
Saving energy	71%	72%
Saving water	63%	61%
Saving materials	63%	61%
Recycling, by reusing material or waste within the company	49%	52%
Switching to greener suppliers of materials	43%	42%
Designing products that are easier to maintain, repair or reuse	30%	33%
Using predominantly renewable energy	22%	28%
Selling your residues and waste to another company	27%	25%

Source: Eurobarometer 2024, n=640

**Figure 4: Resource efficiency measures undertaken by companies in the tourism ecosystem (EMI Report on tourism, 2024)**

## 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](#).

The [European Declaration on cycling](#) was adopted in April 2024 by the European Parliament, the Council and the European Commission, aiming to boost bike use in the EU and contribute to sustainable tourism. Road transport has the highest share of greenhouse gas emissions from transport: cars alone account for 12% of all EU CO<sub>2</sub> emissions.

In May 2024, the Council adopted new rules to strengthen emission standards for [heavy-duty vehicles](#). Under the new rules, all new urban buses will have to be zero-emission vehicles by 2035, while long-distance buses and coaches will remain subject to the overall targets. In addition, the [Euro 7 Regulation](#), adopted by the Council in April 2024, sets rules for emissions from cars, vans and heavy-duty vehicles, supplementing CO<sub>2</sub> limits and covering other polluting elements (pollution from tyre abrasion, brakes and batteries).

In 2022, aviation contributed 2% to the global carbon dioxide (CO<sub>2</sub>) emissions, experiencing a faster growth rate in recent decades compared to rail, road, or shipping. EU institutions continued working on developing common rules and objectives for the management of European airspace under the Single European Sky. Efficient air traffic management should help reduce emissions from the sector. In March 2024, [the Council and the European Parliament reached a provisional agreement](#) on the reform, which was finally adopted by the Council and the European Parliament at [first reading](#) on 11 November 2024.

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 preparing, monitoring and implementing their sustainable urban mobility plans (SUMP). With the entry into force of the revised TEN-T Regulation, 431 EU urban nodes will be now required to adopt a sustainable urban mobility plan (SUMP) and collect and report relevant data on key urban mobility indicators (UMI). In 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.

Furthermore, revised regulation regarding the EU guidelines for the development of the TEN-T network was adopted by the Council in June 2024, aiming to build a reliable, seamless, and high-quality transport network that ensures sustainable connectivity across Europe without physical interruptions, bottlenecks, and missing links. The regulation also requires data collection and submission in sustainability, safety and accessibility. The Commission is now working on a set of urban mobility indicators (UMI) that capture key aspects of each of the three fields. The regulation also requires data collection and submission in the fields of sustainability, safety and accessibility. The European Commission is now working on a set of urban mobility indicators (UMI) that capture key aspects of each of the three fields.

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**Member State action:** sustainable urban mobility plans that include also visitors' perspective are considered a challenge in seven Member States, while eight Member States consider such plans a priority. Five Member States reported more attractive railways for visitors as a priority, eight as a challenge. Altogether 15 Member States report taking measures to address these both issues and 8 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: Austria

The City of Vienna is dedicated to offering sustainable mobility options to all residents and visitors. Through the Smart Climate City Strategy Vienna and the Vienna Climate Guide, both adopted in 2022, the city aims to reduce greenhouse gas emissions, targeting net-zero emissions by 2040 and a 50% reduction by 2030. The city also plans to increase the share of trips using sustainable transportation methods to 85% by 2030, with further growth by 2050.

**Stakeholder action:** key figures for transition pathway topic 6 pledges:

32 pledges	12 Member States	11 organisation types	38% 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; (see example box);
- local administrations developing and updating their sustainable urban mobility plans, including improvement of cycling infrastructure;
- NGOs setting concrete targets to increase active and sustainable mobility, in particular cycling tourism, by promoting non-motorised and safe infrastructure and sharing information on good practice;
- regional administrations developing public transport, railways, charging stations and cycling infrastructure, also considering soft mobility options;
- DMOs setting and following concrete targets for their visitors to use public transport and sustainable transport options;

- a research institution driving sustainable mobility decisions through real-time data sharing.

As a supporting collaborative stakeholder effort, the [Alliance for zero-emission aviation](#) (AZE) 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. The [Renewable and Low-Carbon Fuels Value Chain Industrial Alliance](#) (RLCF Alliance) is an initiative dedicated to advancing the production and supply of renewable and low-carbon fuels in the aviation and waterborne sectors, bringing together a diverse range of stakeholders from the transport fuels and related value chains.

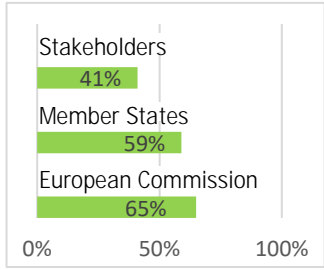
#### Example pledge with [reported progress](#) by Radisson Hotel Group

‘As pioneers in the hospitality industry pushing forward the transition to green mobility, Radisson Hotel Group is expanding its green travel options and infrastructure and decarbonising the business to achieve net zero by 2050.

Radisson Hotel Group works with green mobility car companies and transport providers to offer guests green options and give them peace of mind, that, by choosing a Radisson Hotel Group hotel, guests can have a positive impact on people, the community, and the environment. Radisson Hotel Group has set up several EV-mobility partnerships with the aim of bringing EV charging solutions to all European Radisson Hotel Group properties by 2025.

To achieve this, the Group has partnerships with Tesla, Allego and PowerGo which resulted in 700 chargers already being installed, of which 2 are ultra-fast charging hubs.

Moreover, almost 25% of Radisson Hotel Group properties offer exclusively green taxi solutions with hybrid or electric vehicles for guests travelling to events and meetings, with its Radisson Moves offering. As part of its Meeting & Events value proposition and aligned with the Group’s signature 100% carbon neutral meetings, Radisson Hotel Group’s aim is to help drive the e-mobility movement forward in Europe by providing OEMs / automotive companies with a charging network, starting with the right EV charging solution for each location.’

Progress indicators for topic 6 by 2024 based on reported efforts	Change indicator: overnight trips made by train in the EU	
	Value in 2023	146.3 million (vs 108.6 million in 2015 and 140.1 million in 2022)
	Expected for 2025	170 million (to support EU target to double high-speed rail traffic by 2030 compared to 2015)
	Source	Eurostat data table <a href="#">tour_dem_tttr</a>

## 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). The work by the Council and the European Parliament progressed with the adoption of the Council position in June 2024. This proposal includes the objective for the Member States to reduce by December 2030 the generation of food waste per head, jointly in retail and other distribution of food, in restaurants and food services and in households by 30% compared with the amount generated in 2020. In 2020, restaurants and food services represented 9% of total food waste (12 kg per person).

The Commission provides continued support to Member States in achieving targets also through non-regulatory measures, such as common EU methodology to measure food waste consistently, the EU Platform on Food Losses and Food Waste, the guidelines to facilitate food donation. In June 2024, the Pilot Project ‘The European Consumer Food Waste Forum’ launched a toolkit with action planner, a calculator, video tutorials on how to design, implement and evaluate an action, as well as leaflets for food businesses, including the hospitality and catering sector. The businesses are supported via grants for projects to reduce consumer food waste, launched in 2024 under the Single Market Programme.

On 30 November 2022, the Commission proposed to revise the Packaging and Packaging Waste Directive<sup>(4)</sup> to contribute to the reusability and recyclability of packaging and reduction of single-use plastics. The Directive, once adopted and enforced, will significantly impact the hospitality sector by setting restrictions on single-use packaging as well as refill and reuse obligations for take-away sector. In March 2024, the Council and the European Parliament reached a provisional agreement on the proposal. The text is expected to be finally adopted before end of 2024.



The [Fit for 55 legislative package](#) also contributes to the [energy efficiency](#) and [increased use of renewable energy](#) across sectors, including tourism.

Water resilience is a topic that has gained importance during 2024 in the EU agenda. The challenges resulting from the climate change, the extreme weather conditions, natural disasters affect all Europeans and all economic sectors, including tourism. Water scarcity affects 30% of Europeans and 20% of land each year. 70% of Europeans have expressed concern about water pollution and water scarcity, and yet almost half of them do not feel well informed about water-related problems in their country. In July 2024, the Commission launched an awareness campaign [WaterWiseEU](#), an initiative that will contribute towards a water-resilient Europe by 2050.

**Member State action:** there are eight Member States that consider the circularity of the tourism industry a challenge (related to waste/water/pollution and also to food services), while 10 Member States consider improving waste and water management and reducing pollution of tourism services a priority. A total of 13 Member States have measures in place to reduce the environmental footprint of food services, and 10 have measures to improve waste and water management of tourism services. Altogether 13 Member States shared their [concrete practices](#) through TAC reporting.

#### Member State example: Austria

The Austrian Eco-Label for Tourism, established in 1996, provides a voluntary sustainability certification for accommodation providers, restaurants, camping, events and meetings, museums etc. Since 2022, a new Eco-Label for tourism destinations is in place. The criteria to be fulfilled by holders of the label include substantial measures on waste and water management. Examples of criteria with regard to water: use of water-saving technologies, regulated waterflows, waste water treatment, surveillance of water quality, etc. (<https://www.umweltzeichen.at/de/tourismus/nachhaltiger-tourismus>). In 2023, the Federal Ministry of Labour and Economy in cooperation with the Austrian Bank for Tourism Development (OeHT) developed a specific set of Key Performance Indicators (KPI) for tourism to enable measurement of sustainability with regard to ESG as banks and funding institutions increasingly require businesses to provide sustainability reporting. The KPIs also include the measurement of water use (m<sup>3</sup>) and waste (kg) per overnight stay / per seat. Reporting on these indicators is part of the funding process at the OeHT. <https://www.oehrt.at/der-oekb-esg-data-hub-fuer-tourismusbetriebe/>

<https://oekb-esgdatahub.com/en.htm>

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(<sup>4</sup>) [Packaging waste \(europa.eu\)](#), Procedure [2022/0396/COD](#).



**Stakeholder action:** key figures for transition pathway topic seven pledges:

24 pledges	8 Member States	10 organisation types	25% completed/ with results
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Stakeholders' pledged the following actions:

- large companies developing circular strategies and collaborations to reduce their environmental impact;
- 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 for their sector and share good practice recognised by 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, such as an NGO helping restaurants adopt eco-friendly practices, enhance transparency, and reduce environmental impact (see example box);

Furthermore, the expert group T4T working on green transition, on 10 June 2024 held a webinar on [Food waste management in Tourism](#), which presented hands-on, practical cases in the hospitality sector. As a follow-up, the expert group is working on further actions and recommendations.

### Example pledge with [reported progress](#) by Surfrider Foundation Europe

‘To reduce plastic pollution and reverse the trend of climate change SFE launched the ocean friendly restaurant campaign. In the food service industry, business models can be improved to reduce food waste, stop excessive use of plastic, and support local, organic producers. Ocean Friendly Restaurants is a programme to assist restaurants owners in an eco-responsible transition within their daily offerings, operations and environmental outlook. Its objectives are:

Establish an inclusive programme criteria that is accessible, inviting, and allows a variety of restaurant models to make sustainable changes that are appropriate for their unique business.

Give citizens more transparency into the food service industry and the opportunity to choose restaurants that support their eco-responsible values.

Reduce the environmental impact of the food service industry by following the adoption of targeted legislative measures.

If this campaign is Europe-wide [sic], it will be more specifically spread on touristic coastlines to ensure the pursuit of a global effort towards Ocean protection by restaurants. more specifically with our partnership with the Nouvelle-Aquitaine region (see topic 12), we aim to propagate this campaign through the more than 700 km coastline of this region by 2025.’

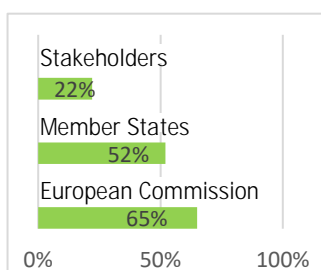
SFE also works with hotel companies as a free plastic hotel is in the making with the intercontinental hotel of Marseille. Moreover, the idea is to make an example of it to share it success story with the hotel industry and have, at least, more than 30 plastic free hotels by 2030.’

### Example pledge with [reported progress](#) by Costa Group

**Costa Group cruise ships** are true floating smart cities: on board we sort and categorise 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 depuration 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 depuration. This could become a source of inspiration for major structures in the hospitality sector.

Progress indicators for topic 7 by 2024 based on reported efforts

Change indicator: food waste from restaurants and food services per person



Base value in 2022

15 kg/person (up from 12 kg/person in 2021)

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). To promote the uptake of EMAS by tourism companies, the Commission organised on 27 September 2024 a webinar ‘How EMAS can support improving the sustainability of the tourism sector’, offering insights into the application of EMAS in the tourism sector and concrete experience of tourism companies.

The [EU Ecolabel](#) is a ‘best-in-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 179 new licences (+23%) between September 2023 and September 2024, raising the total number of EU Ecolabel tourist accommodation services to 799. 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 December 2024 show that of 616 EU Ecolabel licences awarded to tourist accommodation establishments that provided the information, 328 have been awarded to micro-enterprises, 273 to SMEs and only 15 to large companies. In order to raise awareness of the possibilities and benefits of applying for the EU Ecolabel, in June 2024, the Commission organised a webinar to tourism accommodations ‘Bring tourist accommodation into the green spotlight with the EU Ecolabel.’

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](#).

Furthermore, the [Partnership on Sustainable tourism](#), supported by the Commission under the Urban Agenda for the EU, has set out an action for destinations to enable the use of sustainability certifications for the SMEs.

It is expected that the entering into application of the [Directive ‘Empowering consumers for the green transition’](#) (planned for September 2026) and of the forthcoming Directive on Green Claims will further boost the uptake and consumer awareness of reliable labels and sustainability schemes, among them the EU Ecolabel, EMAS and PEF.

**Member State action:** based on TAC reporting, six Member States consider helping SMEs to engage in environmentally friendly practices a challenge, and seven consider using green public procurement criteria for procuring tourism-related services (travel, hospitality, catering) as challenging. For both aspects, 11 Member States consider them a priority. However, they more often have measures to support SMEs (13 Member States) than to tackle the use of green public procurement criteria (7 Member States). Altogether 9 Member States shared examples of their [specific practices](#) through TAC reporting, while two (Finland, Estonia) have also made specific pledges on supporting the green transition of tourism companies.

### Member State example: Portugal, outermost region of the Azores

In January 2023, a New Model of the Azores Sustainability Charter, promoted by the Regional Secretariat for Tourism, Mobility and Infrastructures and by Sustain Azores, was presented, in line with the commitment taken by the Azores DMO under its pledge to the Sustainable Tourism Pathway. The Charter aims to support the adoption of the Agenda 2030 principles in an inclusive and comprehensive way in the different sectors of society.

### Member State example: Greece

In Greece, a new governance framework has been established for Destination Management and Marketing Organisations (DMMOs) at regional and municipal levels to enhance destination management and promote sustainable tourism. Complementing this, the Ministry of Tourism has introduced the concept of ‘Model Tourist Destinations of Integrated Management’ (MTDIM). These are designated based on criteria such as natural features, tourism potential, infrastructure accessibility, and accommodation capacity.

**Stakeholder action: key figures for transition pathway topic eight pledges:**

<b>52</b> pledges	<b>13</b> Member States	<b>14</b> organisation types	<b>29%</b> completed/ with results
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Examples of specific 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;
- 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 (see example box below).

In March 2024, the T4T stakeholder expert group contributed to advancing the dialogue on measuring environmental footprint with a widely attended [webinar](#) on measuring EU tourism environmental impacts. As a follow-up, the expert group is preparing the recommendations to the Commission, Member States and tourism businesses.

### Example pledge with reported progress by ECOTRANS

We have developed multi-stakeholder networking approaches to sustainable tourism development for the past three decades, culminating in the development of the Tourism2030.eu Portal and European Tourism Going Green 2030 (ETGG2030) Innovation Training and Implementation system, which will be realised through regional and national tourism sustainability certification clusters linked to the overall European and Global SDG processes.

‘Through the Tourism2030.eu portal we offer access to capacity-building programmes, technical and financial assistance for SMEs to engage in environmentally friendly practices and schemes through participation in the ETGG2030 programme.

[...]

Targets and milestones include the establishment of sustainability certification clusters, sustainability third party verified certification of SMEs and destinations, and establishment of an indicator of nr of SMEs with third party verification in a specific territory.

We aim to have:

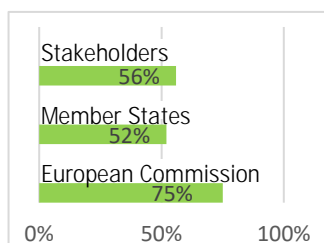
2023: European level + 6 national sustainable tourism certification clusters, 2% certified accommodation businesses in the European tourism supply chain

2025: EU coverage of national tourism certification clusters, 5% certified accommodation businesses

2030: Global coverage of tourism certification clusters in destinations with protected areas, 10% certified accommodation businesses in Europe’

Progress indicators for topic 8 by 2024 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](#))



Base value in 2022

5 652

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

**Commission action:** the Commission's key support instrument for research and innovation (R&I) is the 2021-2027 Horizon Europe framework programme. 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 July 2024, R&I funding under H2020/Horizon Europe had been given to [319 projects](#) with links to tourism, sustainability, climate and circularity.

Sustainable and innovative tourism in the urban destinations is also supported by the [Innovative Actions 2nd call of European Urban Initiative \(EUI\)](#), where seven projects were selected under the Sustainable tourism topic. Selected cities will benefit from up to 5 million EUR each to test urban innovative solutions.

The [EU Cluster collaboration platform](#) includes 41 cluster organisations or initiatives dedicated to tourism, most supporting development of sustainable tourism. Furthermore, two projects under Euro Clusters are supporting rural and maritime tourism: [Eurocluster Rural Tourism - About Us](#) and [IKAT | Project \(ikatproject.com\)](#). 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 20.5 million EUR](#) 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 13 Member States, while 14 have



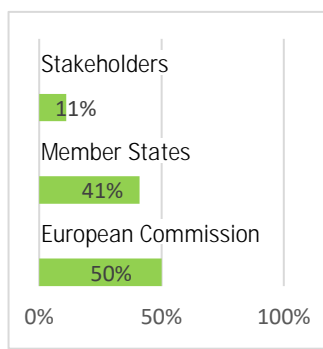
established specific measures. There are 10 Member States that have shared [practices](#) through their TAC reports.

**Stakeholder action:** key figures for transition pathway topic 12 pledges:

21 pledges	11 Member States	10 organisation types	14% completed/ with results
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Specific actions carried out by stakeholders include:

- regional administrations dedicating funding to supporting development of sustainable tourism projects for specific types of tourism and in rural areas;
- 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.

Progress indicators for topic 12 by 2024 based on reported efforts	Change indicator: number of ongoing EU-funded R&I projects linking with environmentally sustainable tourism									
 <table><caption>Progress indicators for topic 12 by 2024 based on reported efforts</caption><thead><tr><th>Stakeholder</th><th>Percentage</th></tr></thead><tbody><tr><td>Stakeholders</td><td>11%</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	11%	Member States	41%	European Commission	50%	Base value in 2022	112
Stakeholder	Percentage									
Stakeholders	11%									
Member States	41%									
European Commission	50%									
	Expected for 2025	200 (including also EU funding programmes other than Horizon Europe)								
	Source	<a href="#">CORDIS search for ongoing projects in 2022 with search words ‘tourism AND (sustainability OR climate OR circularity)’</a> / 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>	Common environmental benchmarks exist for key tourism products and services, which are used by public and private organisations	
EU Agenda 2030 invites the Commission to:		
... test the use of environmental footprint methodologies for the tourism ecosystem;		

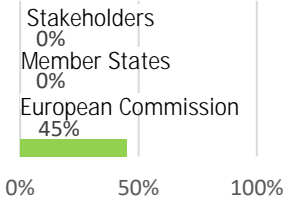
**Commission action:** the Commission adopted a proposal for a Directive on green claims in March 2023 <sup>(5)</sup> highlighting the need to substantiate businesses' environmental claims. The proposal builds on the Directive on empowering consumers in the green transition, adopted in February 2024<sup>(6)</sup>. 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. The project is being implemented in close cooperation with the hotel industry, through their membership in the Technical Secretariat. The first draft PEFCR should be available for the public consultation in first quarter of 2025.

**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**

1 pledge	1 Member State	1 organisation type	0% completed/ with results
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<sup>(5)</sup> [Proposal for a Directive on green claims \(europa.eu\)](#), procedure [2023/0085/COD](#).

Progress indicators for topic 13 by 2024 based on reported efforts	Change indicator: existing product environmental footprint category rules and calculation support datasets for tourism services	
	Base value in 2022	No
	Expected for 2025	Yes
	Source	DG GROW desk research

## 2.3. Digital transition

The digital transition of the tourism ecosystem is a key enabler for greener and more resilient tourism practices. [Figure 6](#) shows the [EU Tourism Dashboard](#) index of selected indicators on the digital transition (see Annex IV).

Digital Technologies	Share of adoption (2023)	Share of adoption (2024)	
Cloud	25.24%	37.07%	↑
Artificial Intelligence	8.01%	22.95%	↑
Internet of Things	9.81%	19.67%	↑
Big Data	13.60%	11.48%	
Augmented and Virtual Reality	3.59%	7.65%	↑
Blockchain	1.79%	6.01%	↑
Robotics	1.79%	2.73%	
Edge Computing		2.37%	

Source: EMI Survey 2024

Figure 6. Share of companies in the tourism industrial ecosystem that indicated having adopted advanced digital technologies

In its analysis of digital technology start-ups across EU sectors, the [European Monitor of Industrial Ecosystems \(EMI\) project](#) revealed an increase in the uptake of all digital technologies except big data, which decreased from 13.6% in 2023 to 11.5% in 2024. The largest increase is seen in cloud technologies and artificial intelligence, the latter increasing by nearly 15% and the Internet of Things, which increased by almost 10% as shown in [Figure 6](#).

(6) Directive - EU - 2024/825 - EN - EUR-Lex (europa.eu).

### 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
<b>EU Agenda 2030 invites Member States to:</b>	
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, which resulted in a EDIH Tourism Working Group set up in Spring 2024. The EDIH Tourism Working Group organised webinars and events throughout 2024, on topics relevant not only for the tourism sector, but also for Public Administration operators, thereby ensuring synergies among sectors and clusters of EDIHs.

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 July 2024, the [EEN partnering opportunities](#) included 207 profiles with the keyword ‘tourism’.

Furthermore, for some destination management organisations or regions, the tourism sector is part of the smart specialisation (RIS3) strategies and Community of Practice. This innovative approach could concern not only the digitalisation of services with IT networks and digital skills, but also for specialised services, such as equipment for clinics, health centres and sanatoriums for wellness tourism.

The [EMI survey of tourism SMEs](#) showed that advanced technologies are already being taken up in innovative companies and have increased compared to 2023 apart from big data: 37% were using cloud technologies up from 25%, 11.5% were using big data (down from 13.6%), and 23% had adopted artificial intelligence up from 8%.

**Member State action:** a total of 15 Member States (15 being the highest number across all reported action areas) considered it a priority to support developing innovative personalised tourism services and/or data-driven destination management, and 13 have introduced specific measures to tackle these issues. There are 12 Member States that have

shared their [best practice examples](#) in their TAC reports, while 2 (Finland, Austria) have made pledges on this topic.

#### Member State example: Spain

Spain has developed an Intelligent Tourism Destination model. The aim is to consolidate on a state-of-the-art technological infrastructure, which guarantees the sustainable development of the tourist territory, accessible to all, facilitating the interaction and integration of the visitor with the environment and increasing the quality of their experience in the destination and the improvement of the quality of life of the resident.

**Stakeholder action:** key figures for transition pathway topic nine pledges:

17 pledges	11 Member States	8 organisation types	35% completed/ with results
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Specific actions by stakeholders depend on their operating contexts and objectives and include:

- SMEs using real data to objectively assess the impact of tourism on various societal aspects, (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 Arctur

“Tourism Impact Model (TIM) is an award-winning tool, using real data to create an objective picture of the impact of tourism in a certain micro-location. It analyses different societal aspects: from environment, economy and culture to collaboration. [...]

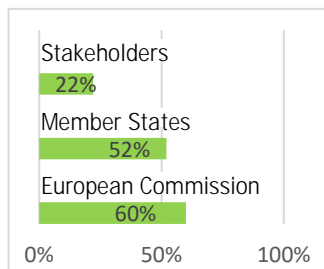
TIM enables local decision-makers and strategy makers to consider the challenges, opportunities and future of a tourism location holistically - exploring the impact of new developments on existing services. [...]

TIM has already been tested and used in 36 locations around Europe (Black Sea area, Slovenia, Danube region, etc.) and is available on the European market. Until 2025 we plan to make 40-50 new TIM assessments around Europe. Which will result in the take-up of data-driven destination management tools and in increased offer of personalised tourism services.

On a long term, until 2030 and above, our commitment is to fully support tourism destinations to create personalised/sustainable tourism experiences while successfully managing tourism flows by leveraging the use of TIM tool and analytics.

More about TIM: <https://tourism4-0.org/tim/>’

Reported progress: TIM will be used in 2 EU coastal destinations in 2025. TIM light (easier, faster version) was developed and approximately 10 TIM light trials were realised in Slovenia in 2024.

Progress indicators for topic 9 by 2024 based on reported efforts	Change indicator: take-up of one or more advanced technologies (cloud, AI, big data) by tourism companies									
 <table><thead><tr><th>Entity</th><th>Progress (%)</th></tr></thead><tbody><tr><td>Stakeholders</td><td>22%</td></tr><tr><td>Member States</td><td>52%</td></tr><tr><td>European Commission</td><td>60%</td></tr></tbody></table>	Entity	Progress (%)	Stakeholders	22%	Member States	52%	European Commission	60%	Base value in 2023	31% cloud, 20.4% internet of things, 17.3% robotics, 15.3% big data, 13.7% artificial intelligence
Entity	Progress (%)									
Stakeholders	22%									
Member States	52%									
European Commission	60%									
	Expected for 2025	48% (on a path to reach 75% by 2030 in line with <a href="#">Digital Decade targets</a> )								
	Source	<a href="#">Annual EMI project survey of tourism SMEs</a>								

### 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 online 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. In 2024, the Commission also began disseminating the information among stakeholders to prepare for the new round of applications of Generic Top-Level Domains by the [Internet Corporation for Assigned Names and Numbers](#) (2026). Generic Top Level Domains (gTLDs), managed and attributed by managed by the Internet Corporation for Assigned Names and Numbers (ICANN) are the characters ("extension") found at the end of a domain, and can vary from branding, generic, or geographic (e.g. audi. .jobs or .berlin). New gTLDs can strengthen EU companies, destinations, and organisations' footprint on the internet, providing more easily accessible and reliable information for tourists and new branding possibilities. Costs and complexity of the application process, however, could provide potential challenges for destinations and companies, and in 2025 the Commission will stand ready to assess needs and guide interested parties through the application process.

#### Member State example: Lithuania

The National Tourism Information System in Lithuania is designed to connect tourists with service providers through a comprehensive, automated platform. It will collect and integrate data from natural landmarks, cultural sites, and tourism services, including mobile phone data. The system will provide information on the Lithuania travel website, allowing users to create personal travel routes and tour packages.



In addition, the [EU Smart Tourism Podcast series](#) was launched in May 2022. Since its inception, the podcast has consistently released new episodes, reaching a total of 14 episodes to date and 2 110 downloads. The podcast series covers various topics related to smart tourism within the EU, including technological innovations, sustainable practices, and insights from industry experts. Each episode aims to provide valuable information and perspectives to listeners interested in the future of tourism. The podcast is hosted on Podbean and distributed to the major podcast platforms: Spotify and Amazon Music. It is also available on LinkTree for easy sharing on social media.

**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 (ECC-Net) in providing clear information on the rights of tourists/travellers, including on dispute resolution mechanisms.

**Member State action:** improving the availability of online information on tourism offers is considered a priority in nine Member States and nine Member States shared their [best practice examples](#) in TAC reports. However, two Member States (Finland and Slovakia) have pledged to support their stakeholders.

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

24 pledges	11 Member States	9 organisation types	29% completed/ with results
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Examples of stakeholders' actions on improving online information include:

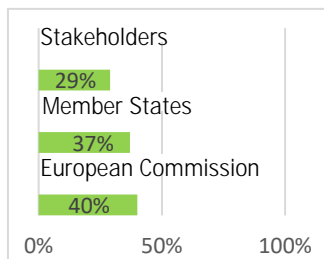
- A national administration providing a DataHub for travel products across multiple channels and platforms, highlighting sustainability and the STF label (see the example box below);
- several SMEs providing tools to make visible officially communicated tourism offer as well as information generated 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;
- an NGO systematically increasing available online information on sustainable tourism itineraries across different countries.

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

‘SmartGuide pledges to digital travel content that combines geolocation and navigation with exciting local content in one product optimised to use on the go.

To grow the supply of such content offerings, SmartGuide pledges to offer its Content Management System (CMS) to content creators self-service for free to publish digital guides as long as they meet the content quality requirements. The CMS makes content creation fast and easy with smart functions, such as the import of readily available open data (OSM, Wikipedia) automated route generation, built-in DeepL translations, and natural text-to-speech audio being recorded as you type. The CMS allows anyone to publish a professional travel guide as easy as uploading a video on YouTube. Unlike traditional guides (such as Lonely Planet), SmartGuide pledges to leverage the whole community to create guides that cater to tourists and locals with different interests.

SmartGuide covers over 600 destinations and aims to cover over 7 000 user-generated guides by 2025. That includes many small/rural destinations or attractions. For example in Czechia, there are already more than 150 destination guides providing deeper understanding of the must-see places and inspiring domestic and international tourists to discover exciting places that they would not otherwise notice.’

Progress indicators for topic 10 by 2024 based on reported efforts	Change indicator: share of EU tourism companies with a website									
 <table><thead><tr><th>Stakeholders</th><th>Progress</th></tr></thead><tbody><tr><td>Stakeholders</td><td>29%</td></tr><tr><td>Member States</td><td>37%</td></tr><tr><td>European Commission</td><td>40%</td></tr></tbody></table>	Stakeholders	Progress	Stakeholders	29%	Member States	37%	European Commission	40%	Base value in 2023	95% (web-based analysis Q4/2024)
Stakeholders	Progress									
Stakeholders	29%									
Member States	37%									
European Commission	40%									
Expected for 2025	100% (to support <a href="#">Digital Decade target</a> of 90% of SMEs having at least basic digital intensity by 2030, starting with a website)									
Source	Annual <a href="#">EMI Tourism report</a>									

### 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](#) entered into application 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 a European Digital Infrastructure Consortium (EDIC).

Both actions are ongoing. In the first half of 2024, the Commission launched a test use case to experiment with the interoperability of data sets from different data sources. Four Member States participated to the project on a voluntary basis, and the final deliverables, available on the T4T Stakeholder platform, were presented at the European Tourism Forum in Budapest (November 2024).

In parallel, the Commission is holding talks with Member States as regards setting up an EDIC as the governing body of the future tourism data space, with several opportunities for exchange and discussion in spring and autumn 2024.

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 8 million EUR opened in September 2023](#). In 2024, the consortium [Deploytour](#) initiated works under this call to deploy the infrastructure of the tourism data space. Data generated under the [Regulation on short-term rentals](#) could contribute to data sharing objectives within this space.

**Member State action:** in total 13 Member States reported that making tourism-relevant data available as a priority, and 9 had undertaken specific measures. Twelve Member States shared their [practices](#) through TAC reporting. In addition, a Member State (Austria) presented a pledge on the topic.

### EU Example: EU Space data for the Common European Data Space for Tourism

Space data can enhance tourism services and decision making by providing valuable information derived from Earth Observation and satellite navigation. For example data from the Copernicus programme help monitor environmental conditions and the impact of tourism on natural resources, supporting sustainable tourism. Navigation data from the Galileo system, improve geolocation services enabling more accurate navigation for tourists, optimised transport routes and enhanced location-based services (LBS) increasing tourist experience. Integrating space data with other data sources in the Common European Data Space for Tourism, would facilitate stakeholders' decision making, improve visitor experience and contribute to the overall sustainability of tourism.

### Member State example: Finland

The Finnish Heritage Agency and its partners recently produced a 3 D model of Petäjävesi Old Church to help preserve valuable information of this cultural heritage site for future generations. Petäjävesi Old Church is inscribed on UNESCO's World Heritage List, and thus, is a particularly important and representative building not only in Finland but also in Europe. The public can access the 3 D model online, free of charge, at Finna.fi and on the Finnish Heritage Agency's Finna page. <https://pro.europeana.eu/page/twin-it-3d-for-europe-s-culture>

### Stakeholder action: key figures for transition pathway topic 14 pledges:

12 pledges	6 Member States	9 organisation types	17% completed/ with results
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Specific 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;
- 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 (see example box).

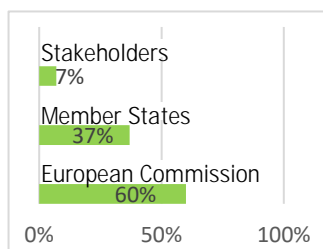
As a key collaborative effort, EU tourism stakeholders have developed and published in February 2023 a joint [Code of Conduct on Data Sharing in Tourism](#) to build trust between

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 the Government of Andalusia

‘Andalusia through the NECSTouR ToTTLab is partnering with the key European data players in a way we can contribute to the feasibility analysis of the ‘European Tourism Data Space’. We have presented a proposal and it has been selected, therefore by 2025 we will support the work with respect to:

- Identify a set of priority data set and data themes and potential use cases.
  - Identify roles and interactions in a European Tourism Data Space
  - Outline an Open and inclusive Governance framework
  - Work on a roadmap for the implementation and operationalisation of the Governance & Business Framework
  - Work on community Building and Ecosystem Development activities
- . By 2025 we commit to identifying 3 use cases and working within the partnership of NECSTouR Tourism of Tomorrow Lab in supporting the creation of a uniform, streamlined and transparent Tourism data ecosystem for the benefit of the greater community’

Progress indicators for topic 14 by 2024 based on reported efforts	Change indicator: number of tourism-related datasets provided by EU Member States at data.europa.eu									
 <table><caption>Progress Indicators Data</caption><thead><tr><th>Entity</th><th>Progress (%)</th></tr></thead><tbody><tr><td>Stakeholders</td><td>7%</td></tr><tr><td>Member States</td><td>37%</td></tr><tr><td>European Commission</td><td>60%</td></tr></tbody></table>	Entity	Progress (%)	Stakeholders	7%	Member States	37%	European Commission	60%	Base value in 2024	9 621 (11 Dec 2024)
	Entity	Progress (%)								
	Stakeholders	7%								
Member States	37%									
European Commission	60%									
Expected for 2025	7 669 (increase of 50 datasets per Member State per year)									
Source	<a href="#">Online query to data.europa.eu portal with keyword 'tourism'</a>									

### 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:** since 2022, Horizon Europe has supported digital development projects in the tourism ecosystem, both through [targeted calls for digitalisation](#) 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 2023 and 2024, the Commission [launched 70 projects](#) to enhance digital innovation in over hundreds of SMEs. The Commission also launched in 2022 the European Parliament [pilot action](#) on identifying and developing digital tools and solutions for the restaurant sector, which was completed in January 2024 with the publication of a [guidebook](#).

**Member State action:** a total of 10 Member States consider it a priority to support developing advanced technologies in the tourism ecosystem and 9 report having specific measures in place. From respondents, six Member States shared their [practices](#) in their TAC reports. In addition, two Member States (Austria and Estonia) have made pledges on the topic.

#### Member State example: Slovenia

Slovenia is at the forefront of integrating digital innovation into cultural heritage to enhance tourist experiences. In 2022, the Portal of Digitalised Cultural Heritage was launched. From 2019 to 2022, 31 major tourist destinations digitised at least three examples of cultural heritage and created new tourist experiences. Over 100 facilities of immovable cultural heritage have been digitised, contributing to the 'Slovenia Unique Experience' brand.

**Stakeholder action: key figures for transition pathway topic 15 pledges:**

<b>15</b> pledges	<b>10</b> Member States	<b>7</b> organisation types	<b>40%</b> completed/ with results
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Specific actions by stakeholders include:

- SMEs developing innovative products and functionalities for tourism services and destination management making use of advanced digital technologies such as virtual reality and artificial intelligence (AI) (see example box);
- 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 AR VISION 2049**

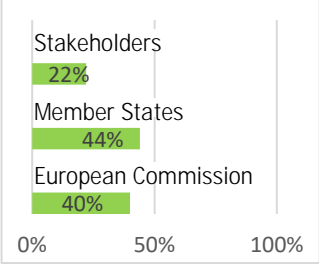
'AR Vision has developed an application called CultuAR to improve tourist experiences through extended reality, augmented reality, virtual reality, big data and artificial intelligence.

AR Vision 2049 S.L. makes, and undertakes to continue making, a continuous effort in terms of research and development for the continuous improvement of CultuAR in terms of:

1. Promoting the knowledge of the cultural heritage of tourist destinations.
2. Improving the customer and user experience.
3. Generating data to improve efficiency in the tourist management of destinations.
4. Improving accessibility of information.
5. Increasing tourism sustainability through our solution.
6. Reducing signalling costs and consumption of resources.
7. Inclusion of new information representation formats.
8. Improvement of information quality provided about the points of interest of each tourist destination.
9. Generating of a positive impact in the preservation and promotion of cultural heritage, economy, employment and social inclusion in the destinations that use our tool.

CultuAR currently has a community in Spain of more than 150 tourist destinations and information on almost 2 000 points of tourist and cultural interest. Our goal for 2025 is to expand our community to more than 1 000 destinations in Europe and another 1 000 in the rest of the world, exceeding 30 000 points of interest in total.'



Progress indicators for topic 15 by 2024 based on reported efforts	Change indicator: number of ongoing EU-funded R&I projects linking with tourism and digital technologies	
	Base value in 2024	114
	Expected for 2025	200 (including also other EU programmes than Horizon Europe)
	Source	<a href="#">CORDIS search for ongoing projects in 2022</a> 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
Raising awareness of tourism SMEs on the benefits of digitalisation and on existing European, national and regional digitalisation programmes for SMEs	90% of tourism SMEs have reached a basic level of digital intensity by 2030 and participate in the tourism digital value chain
Developing a searchable inventory on existing transferable digital tools and practices for SMEs and destinations	Online inventory of transferable tools and practices published by 2023
Establishing a community of practice and a shared toolbox for data-driven destination management	Community of practice and toolbox for data management in destinations by 2023
EU Agenda 2030: actions	Expected outputs
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	Tourism SMEs to have reached a basic level of digital intensity by 2030 in line with the Digital Compass objectives
The Commission to collect and share best practices on digital tools and practices for tourism	Searchable collection on transferable digital tools and practices for tourism published by the Commission by 2023
	Community of practice and toolbox for destination management by 2023

**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, which are available on the [T4T platform](#). With the support of the European Parliament, in December 2023 the Commission launched a pilot project on [EU Competence Centre for data management](#) in

tourism destinations (D3HUB). In 2024, D3Hub selected 30 destinations across the EU to support on data management and data sharing practices.

In response to a call from the European Parliament, in 2024 the Commission also funded a set of online guidelines, to be kept updated through the T4T stakeholder platform, for SMEs and destinations on how to access and use the D3Hub as well as the common European tourism data space.

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 11 Member States consider it a priority to support the digital transition of SMEs and 15 have put in place measures to address the issue. There are eight Member States that shared their [practices](#) in their TAC reports, while three (Austria, Estonia, and Slovakia) have presented pledges on the topic.

#### Member State example: Austria

In March 2023 new funding guidelines for tourism SMEs were launched. These include a sustainability bonus of 7% for investments related to the three dimensions of sustainability: ecological, social, economic. Enterprises will receive the ‘digital’ sustainability bonus, e.g. for investments in hardware and software contributing to the digitalisation of business models and processes, improvement of IT and cybersecurity, digital transformation of sales and distribution processes.

**Stakeholder action:** key figures for transition pathway topic 16 pledges:

35 pledges	15 Member States	12 organisation types	31% completed/ with results
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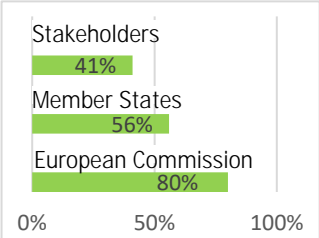
Specific actions by stakeholders depend on their role, and include:

- 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 (see example box);
- 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.

#### Example pledge with reported progress by Unioncamere

‘Through our platform we will provide entrepreneurs and workers in the tourism sector, but not exclusively, access to specialised training activities based on the results of the needs assessment activities. Unioncamere, in collaboration Dintec and the Italian Chamber of Commerce system, works on the enhancement of digital assessment tools as enabling factors for the double transition. We pledge to involve 600 companies in the tourism sector by 2025 and 1600 by 2030 through assessment activities aimed at measuring digital maturity through 3 tools: Self i4.0, Zoom4.0, PID Cyber Check’

Progress indicators for topic 16 by 2024 based on reported efforts	Change indicator: share of accommodation and food enterprises having at least basic digital intensity	
	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 <a href="#">Digital Decade target</a> of 90% of SMEs having at least basic digital intensity by 2030)
	Source	Eurostat table <a href="#">isoc_e_diin2</a>

## 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. **Error! Reference source not found.** shows the [EU Tourism Dashboard](#) index on socio-economic resilience indicators <sup>(7)</sup>.

(7) 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.

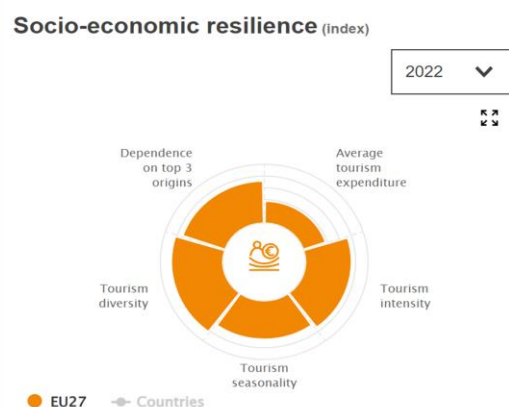


Figure 5: Socio-economic resilience index (EU Tourism Dashboard)

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 recovered from the drop during COVID-19 and even briefly held the top rank. Following the third quarter of 2022 however, a slight decline can be noticed, with recent numbers in the third quarter of 2024 showing again some cause for concern as the tourism ecosystem slipped outside the top five and declined sharply since June 2024.

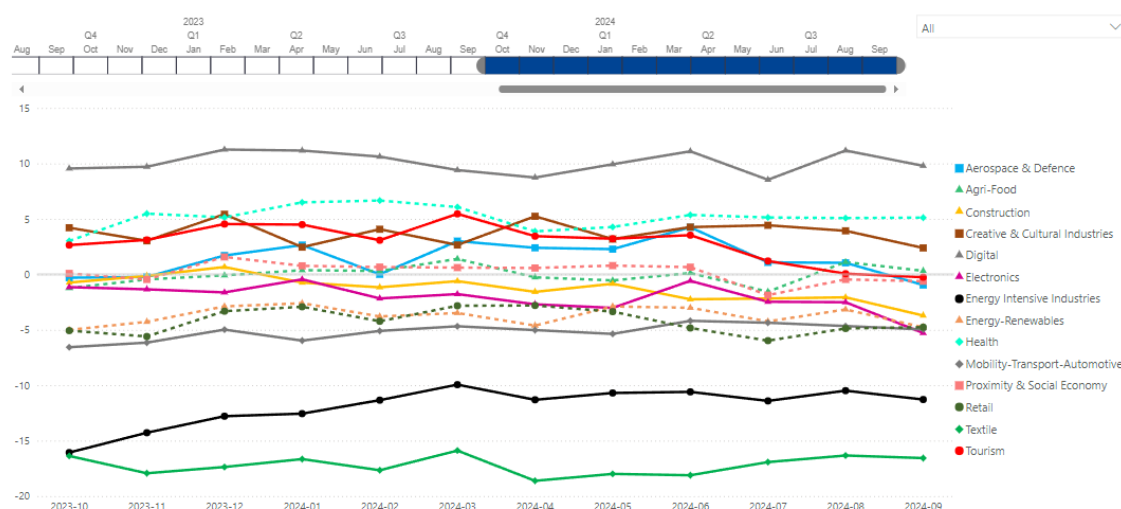


Figure 5: GROW confidence indicator 2022-2024, tourism in red

## 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	The Commission presented a proposal for a Regulation on the digitalisation of visa procedures in 2022, which was adopted in 2023 and is now being implemented.
Digitalising travel documents for EU citizens for improved and faster border processes	The Commission adopted on 8 October 2024 a proposal on the digitalisation of travel documents and facilitation of travel.
<b>EU Agenda 2030 invites Member States to:</b>	
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 44.15% of all international tourism arrivals in the world in 2023 <sup>(8)</sup>. This share has however declined following the record 45.8% in 2022, following the rebound after COVID-19. 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](#) (13) 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 proposal was formally adopted (Regulation (EU) 2023/2667 and Regulation (EU) 2023/2685). The Commission is currently drafting implementing legislation with the support of eu-LISA and the Member States under the examination procedure.

The Commission adopted on 8 October 2024 a legislative proposal on the digitalisation of travel documents and facilitation of travel. To inform the impact assessment that was carried out, 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.

The legislative proposal would enable the use of digital travel documents (or digital travel credentials) for the purposes of crossing the external borders and allow travellers to submit

<sup>(8)</sup> Tourism arrivals data based on [Global and regional tourism performance \(unwto.org\)](#).

their data ahead of travel through a common EU application. This would give border authorities more time to clear travellers and lead to smoother travel for both EU and non-EU travellers due to expedited procedures at border-crossing points. 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](#) <sup>(9)</sup> in October 2023.

**Member State action:** so far, three Member States have carried out pilot projects on the use of digital travel credentials at their external borders. The positive results of the projects have fed into the impact assessment on the legislative proposal. More pilot projects are planned and several Member States have expressed interest in participating.

**Stakeholder action: key figures for transition**

4 pledges	3 Member States	4 organisation types	50% completed/ with results
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pathway topic 17

pledges:

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

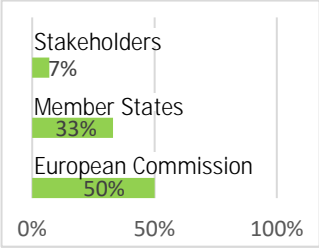
- support from a large company for a seamless cross-border travel experience thanks to the effective management of digital travel documents;
- action by a trade union to address developing cross-border multimodal ticketing approaches and support cross-border transport workers;
- an SME taking the investor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

**Example pledge with [reported progress](#) by Team ABC Ventures**

‘One of our fund’s key goals is promotion of intermodal/seamless travel. We seek to invest in seamless travel solutions. We identify, coach and mentor innovators and entrepreneurs through our engagement with university, incubators and accelerators. Once we identify scalable solutions with the right team we seek to be their first investor.

By 2025, we hope to invest in at least 1 company in this arena.’

<sup>(9)</sup> [EUR-Lex - 52023PC0642 - EN - EUR-Lex \(europa.eu\)](#), procedure [2023/0371/COD](#).

Progress indicators for topic 17 by 2024 based on reported efforts	Change indicator: number of nights spent by non-EU residents in EU accommodation establishments	
	Value in 2023	518 million extra-EU visitor nights (calculation: visitors from any country – intra-EU)
	Expected for 2025	700 million extra-EU visitor nights (return to 2019 level)
	Source	Eurostat table <a href="#">tour_occ_ninraw</a>

## 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 <sup>(10)</sup>.

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 Organisation, 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 and was finalised at the end of 2024. It has delivered educational material on the lessons learnt from the COVID-19 pandemic and other crises affecting tourism in 2024. Aiming to help tourism destination develop resilience and crisis governance, the project worked side-by-side with destinations and cross-border professional associations, with selected tourism experts, providing advisory services to enhance these organisations capacity for crisis prevention, management, and mitigation, leveraging on the developed guidance and collaboration materials. The learning materials and recommendations from the project are now published on the Transition Pathways Platform.

**Member State action:** Topic 18 was included in this year's TAC reporting. Member States reported on their advancements in crisis management capacity. A total of 9 Member States reported it as a priority and 10 Member States have specific measures to address this issue. Member States also reported on adapting tourism services to the changing climate. This was considered a challenge by 11 Member States and is therefore the topic considered as a challenge by the highest number of Member States. 10 Member States consider it a priority and 7 have measures in place. On both, crisis management and adaptation to the changing climate, 7 Member States shared their [practices](#) through TAC reporting.

**Stakeholder action: key figures for transition pathway topic 18 pledges:**

2 pledges	2 Member States	2 organisation types	50% completed/ with results
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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

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<sup>(10)</sup> [Key documents related to the Digital COVID-19 Certificate \(europa.eu\)](#)

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.

Progress indicators for topic 18 by 2024 based on reported efforts	Change indicator: published educational material for crisis resilience including lessons learnt from COVID-19 measures and governance									
 <table><thead><tr><th>Entity</th><th>Progress (%)</th></tr></thead><tbody><tr><td>Stakeholders</td><td>4%</td></tr><tr><td>Member States</td><td>52%</td></tr><tr><td>European Commission</td><td>95%</td></tr></tbody></table>	Entity	Progress (%)	Stakeholders	4%	Member States	52%	European Commission	95%	Base value in 2022	No
	Entity	Progress (%)								
	Stakeholders	4%								
Member States	52%									
European Commission	95%									
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 must 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, cooks, cleaners and drivers 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 across industrial ecosystems experiencing severe staff shortages.

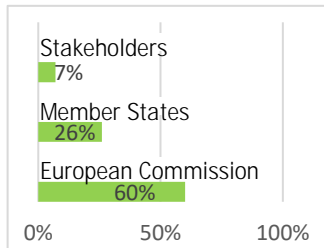
**Member State action:** a total of 12 Member States consider it a priority to support attractive and qualitative tourism jobs, 7 have put in place measures to that end, and 6 have shared their [practices](#) in their TAC reports.

**Stakeholder action:** key figures for transition pathway topic 24 pledges:

6 pledges	4 Member States	4 organisation types	33% completed/ with results
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Specific 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;
- an international organisation evaluating the inclusion of women and minority groups in tourism SMEs;
- 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).

Progress indicators for topic 24 by 2024 based on reported efforts	Change indicator: shares of men and women of the part-time workforce in selected tourism industries							
<p>The Slovene Tourism Board, together with partner institutions in tourism, is implementing a national campaign to promote professions in hospitality and tourism. The campaign runs under the slogan 'I create experiences'. Various stakeholders of Slovenian hospitality and tourism participate in it, such as the Ministry for Economy, Tourism and Sport, the Tourist and Hospitality Chamber of Slovenia, the Chamber of Crafts of Slovenia, SRIPT, with the aim of primarily raising the profile of professions in tourism, helping to achieve a higher quality of services, added value and the fulfilment of sustainable commitments in tourism.</p>								
 <table><thead><tr><th>Stakeholders</th><th>Member States</th><th>European Commission</th></tr></thead><tbody><tr><td>7%</td><td>26%</td><td>60%</td></tr></tbody></table>	Stakeholders	Member States	European Commission	7%	26%	60%	Base value in Q4-2022	Men 27.2%; Women 72.8%
	Stakeholders	Member States	European Commission					
	7%	26%	60%					
Expected for Q4-2025	Men 36% Women 64% (progressing towards equal balance 50%/50% by 2030)							
Source	Eurostat table <a href="#">tour_lfsq6r2</a>							

## 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 2023, 26.8% of the EU population experienced self-perceived long-standing limitations in usual activities due to health problems. Over [one fifth \(21.3%\) of the EU population was aged 65 and over, with the share increasing by 3 percentage points in the past 10 years](#). Both groups are significant customer groups for EU tourism competitiveness and fairness concerns. In 2022, [61.7% of Europeans 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 <sup>(1)</sup>.

**Commission action:** in line with the [strategy for the rights of persons with disabilities for 2021-2030](#), the Commission proposed the [European Disability Card as well as the enhancement of the European Parking Card for persons with disabilities](#) in September 2023. The Directive establishing the European Disability Card and the European Parking Card for persons with disabilities, and the supplementary Directive extending it to third-country nationals legally residing in a Member State were both approved in October 2024.

These rules will make it easier for people with disabilities to travel across the EU because of providing them with legal certainty that their disability status will be recognised when travelling for short stays to other Member States. This will allow them to take advantage of special conditions and preferential treatment offered to residents with disabilities in respect of a wide variety of services, activities, or facilities, including parking rights. 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. Sustainable tourism partnership under the Urban Agenda for EU has prepared a dedicated action aiming to contribute to more accessible tourism for all visitors.

**Member State action:** a total of 9 Member States consider it a priority to boost the provision of accessible tourism services and increase awareness in this area and 17 have introduced specific measures to address this. Moreover, 10 shared their [practices](#) in their TAC reports.

**Stakeholder action:** key figures for transition pathway topic 25 pledges:

19 pledges	8 Member States	8 organisation types	21% completed/ with results
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Specific 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 (see example box below);
- NGOs setting up groups dedicated to sharing best practice, organising events

**Member State example: Greece**

mAiGreece initially offers support in 31 languages, ensuring that travelers from around the world can receive assistance in their language. ‘mAiGreece’ ([mAiGreece - Gov.gr](#)) serves as a Digital Assistant using Artificial Intelligence to operate as a personalised ‘companion’ for all visitors to the country and give consular assistance for urgent issues. Travelers are able to interact with ‘mAiGreece’ by submitting their queries in natural language, whether written or spoken.

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 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.

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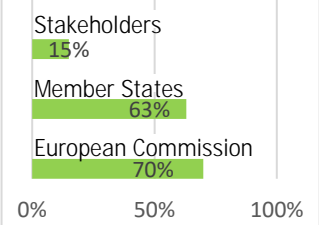
(<sup>11</sup>) [Persons not participating in tourism by reason and age group](#)

### Example pledge with reported progress by ARIA spa

‘ARIA is supporting the Lombardy Region in the implementation of a project dedicated to accessible tourism called ‘S.T.A.I.’ (Servizi per un Turismo Accessibile e Inclusivo), dedicated to the provinces of Bergamo and Brescia.

The project envisages actions of an infrastructural nature not only for overcoming architectural barriers, but also for the provision of aids and services for cognitive, sensory and relational disabilities. The project will also be a laboratory in which to test innovative solutions in terms of accessible urban, mountain and lake routes (e.g. signage and fruition services), internships will be activated for entering the world of work (in tourism) and specific training aimed at tourist guides, info point operators, hospitality operators (hotels and restaurants), health services (including pharmacy operators).

The goal, towards the deadlines of 2025 and 2030, is to extend the main results obtained and the related good practices identified also to the rest of the Lombardy Region’

Progress indicators for topic 25 by 2024 based on reported efforts	Change indicator: share of Europeans 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 <a href="#">tour_dem_npage</a>

## 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. under the Urban Agenda for the EU, launched in 2022, has finalised its action plan and will start the implementation phase in 2025. The partnership will implement concrete actions aiming at more resilient and sustainable destinations through diversification of tourism offer, protection of local retail as an asset for tourism, accessibility, among others.

Similarly, the EU-funded project '[Sustainable EU Tourism – Shaping the tourism of tomorrow](#)' supports destinations, and in particular Destination Management Organisations (DMO) across Europe, to become more sustainable and resilient, with a focus on local communities. Furthermore, under the European Urban Initiative – Innovative actions, seven innovative projects will support more resilient and diversified tourism in urban destinations of Coimbra, Copenhagen, Elliniko-Argyroupoli, Krakow, Prato, Ravenna and Valencia. 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:** diffusing tourism more evenly across seasons, space and diversifying customer groups was considered a priority of 9 Member States, and 17 have concrete measures in place to address the issue. Moreover, 12 Member States consider developing tourism that respects the well-being of residents a priority, and 12 have introduced measures in that area. 12 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

<https://www.bmaw.gv.at/Themen/Tourismus/tourismuspolitische-themen/nachhaltige-entwicklung/tourismusakzeptanz.html>

In Austria, the new guide 'Find the Right Balance' by the Federal Ministry of Labour and Economy supports regional decision-makers to deal with imbalances in tourism and is supported by a funding call to develop tailor-made concepts to address the challenges of impacted regions. [https://www.bmaw.gv.at/Themen/Tourismus/tourismuspolitische-themen/nachhaltige-entwicklung/unbalanced\\_tourism.html](https://www.bmaw.gv.at/Themen/Tourismus/tourismuspolitische-themen/nachhaltige-entwicklung/unbalanced_tourism.html)

**Stakeholder action: key figures for transition pathway topic 26 pledges:**

21 pledges	12 Member States	9 organisation types	24% completed/ with results
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Specific 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;
- 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 business organisation implementing a certification system for LGBTQ+ inclusive destinations and travel organisations (see example box below);
- 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.

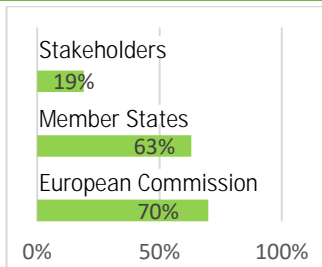
To develop indicators and follow progress on this topic, focus should not be placed on EU or national values alone, as they may hide significant regional differences. It is suggested instead that destinations explore EU Tourism Dashboard resilience indicators, such as [tourism intensity](#), at smaller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

### Example pledge with reported progress by ELTA European LGBTQ\* Travel Alliance

‘ELTA adopts a system of certification for destinations and travel organisations which advocate for the LGBTQ+ community. which is not **just** a label but implies a concrete commitment in monitoring actions and communication (inside the organisation and towards clients) and includes a yearly audit with international auditing systems (RINA) will set the path to a new responsible and hospitable shape of tourism. The path to the certification starts with an initial assessment the ‘state of art’, highlighting evidence of what can be done to improve lgbtq+ inclusion both on the job and towards the market. A mandatory training follows, which is the tool necessary to create either a management handbook (travel organisations) or a manifesto for inclusive hospitality (for destinations). We will support the editing of both. When these documents are ready, the first audit takes place, in order to release the certification and its label. We expect to help at least 3 destinations and 5 travel organisations by December 2024.

ELTA intends to tackle any expression of prejudice against the travelling LGBTQ+ community. This means to develop a project which includes a number of tools which are effective to the scope. These tools include training, certification, audits, events for schools and opportunities to acquire good practices and adopt good neutral communication. This educational project is going to be developed along the three years with closing in December 2026. Results will be measurable by the application of a brand new LGBTQ+ Travel Index, which measures the perception of diversity and inclusion in a destination by algorithms detecting reviews and sentiment on line towards that travel organisation/destination.’

Progress indicators for topic 26 by 2024 based on reported efforts	Change indicator: tourism seasonality (proportion of nights in 3 busiest months of all tourism nights in a year)									
 <table><thead><tr><th>Entity</th><th>Progress (%)</th></tr></thead><tbody><tr><td>Stakeholders</td><td>19%</td></tr><tr><td>Member States</td><td>63%</td></tr><tr><td>European Commission</td><td>70%</td></tr></tbody></table>	Entity	Progress (%)	Stakeholders	19%	Member States	63%	European Commission	70%	Base value in 2022	45%
Entity	Progress (%)									
Stakeholders	19%									
Member States	63%									
European Commission	70%									
	2023 data	42%								
	Expected for 2025	40% (lower value means more equally balanced tourism nights in all months)								
	Source	EU Tourism Dashboard indicator <a href="#">tourism seasonality</a>								

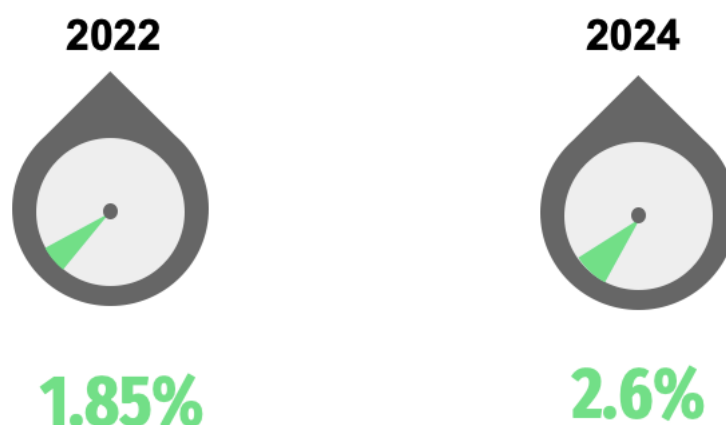
## 2.5. Skills and support for transition

The tourism industry is highly labour-intensive, demanding a mix of organisational, communication, and management skills from its workforce. The ecosystem has increasingly required environmental skills, as sustainability becomes more integral to its operations. Employees must be equipped to manage resources efficiently, reduce environmental impact, and promote sustainable practices in areas such as eco-tourism and green hospitality initiatives.

The [EMI Tourism report](#) analysed demand for digital and green skills in tourism-related job advertisements online. The share of professionals registered on LinkedIn and employed in the tourism industrial ecosystem with skills relevant to the green transition reached 2.6% in 2024, showing an increase from 2022 (see Figure 7). This low share may also be attributed to the tendency of many companies to outsource environmental functions and subcontract external organisations for environmental development initiatives (as the analysis of startups in the previous sections also demonstrate).

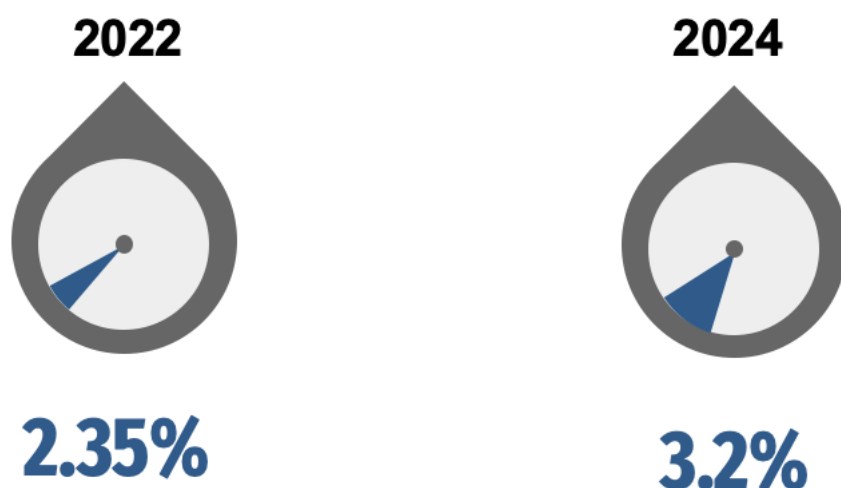
Green skills have been identified as skills related to environmental protection, environmental services, environmental policy, environmental sustainability, environmental standards, low-carbon technologies, renewable energy, the circular economy including circular design and recycling, and clean production technologies and business models-related skills.

Figure 7 Share of professionals in tourism with skills relevant for the green transition in the EU27



On digital skills, the report 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. [Error! Reference source not found.8](#) displays the share of professionals in the tourism ecosystem with skills relevant for the digital transition in the EU.

Figure 8 Share of professionals in the tourism ecosystem with skills relevant for the digital transition in the EU27



Source: Technopolis Group based on LinkedIn

Tourism companies are recognising that in addition to hiring people with new skills, they need to develop the skills of their existing employees. Figure 99 shows 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 staff, with the proportion reaching over 20% in Finland, Poland, Norway and Cyprus.

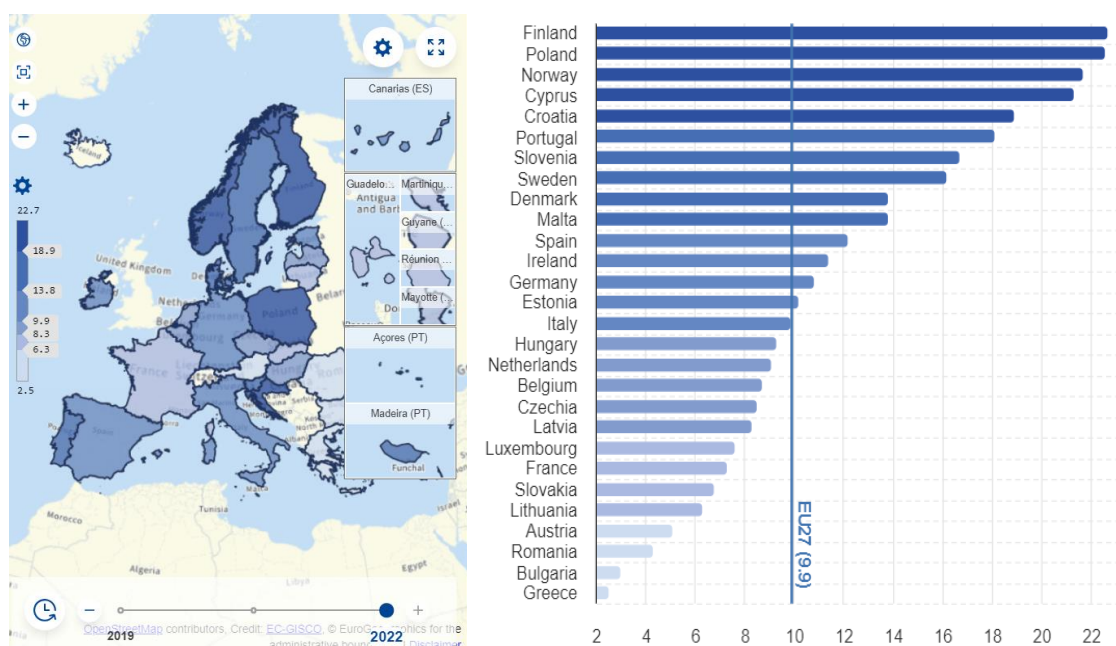


Figure 9: Tourism personnel training on ICT skills ([EU Tourism Dashboard](#))

## 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
<b>EU Agenda 2030 invites Member States to:</b>	
... 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:** as a follow-up to 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. The Commission in 2023 co-funded the [PacTS4ALL](#) project, which aims to coordinate tourism-related upskilling and reskilling initiatives, including the large-scale partnership for the tourism ecosystem under the Pact for Skills.

CEDEFOP provides [a skills intelligence tool](#), updated in 2024, 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.

Sustainable tourism partnership under Urban Agenda for the EU defined an action that will contribute to the development of competences for tourism professionals, local and regional authorities in digital touristic services and products.

**Member State action:** In 2024, this aspect was included in the TAC reporting exercise. A total of 14 Member States consider raising awareness of skills needs in tourism a priority, and 13 Member States have measures in place. 9 Member States shared [specific practices](#) in the TAC report and Estonia submitted a pledge.

### Member State example: Finland

The Finnish Ministry of Economic Affairs and Employment together with regional Centres for Economic Development, Transport and the Environment (ELY Centres) provide The Labour Force Barometer aiming to produce high-quality and comprehensive short-term information on labour and competence needs for citizens, employers, educational institutes and decision-makers.

### Stakeholder action: key figures for transition pathway topic 19 pledges:

8 pledges	5 Member States	5 organisation types	50% completed/ with results
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Specific 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 box 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;
- 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 training.

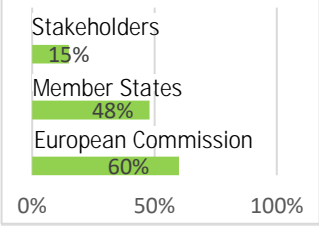
### Example pledge with [reported progress](#) by Federturismo Confindustria

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.'



Progress indicators for topic 19 by 2024 based on reported efforts	Change indicator: participation of tourism workforce in upskilling or reskilling activities	
	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 <a href="#">Pact for Skills annual survey report</a>

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

**Commission action:** the Commission has consistently 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 one 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 annually. Furthermore, it designed the programme of the European Tourism Day 2023 flagship event around the key dimensions of twin transition and resilience. The next European Tourism Day is planned for 2025.

Since 2022, the Commission has organised open tourism stakeholder events twice a year to share examples and best practices on making meaningful pledges.

Promotion of [annual Smart Tourism Capitals and Green pioneer awards](#) contribute to awareness raising on transition pathway areas of action, as well as the 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 of sustainability tools. The Commission co-finances communication campaigns with the European Travel Commission to support the visibility and demand for sustainable tourism in the EU.

The T4T Expert Group's resilience sub-group worked on this topic in the third quarter of 2024 and organised an [open online webinar](#) in December 2024.

### Member State example: Croatia

Ministry of Tourism and Sport is regularly informing national tourism stakeholders about EU Agenda and Tourism Transition Pathway sending emails and inviting them to join to the co-implementation process of activities contained in Tourism Pathway addressing one of pledges or commitments. The information is also available on the ministry's website.

**Member State action:** a total of 12 Member States have introduced measures to share information about the transition pathway and the EU Agenda 2030, and 9 consider this a priority. Moreover, four Member States have shared [best practices](#) through their TAC reports, while two (Estonia and Finland) have also presented pledges on this topic.

### Stakeholder action: key figures for transition pathway topic 20 pledges:

19 pledges	9 Member States	9 organisation types	37% completed/ with results
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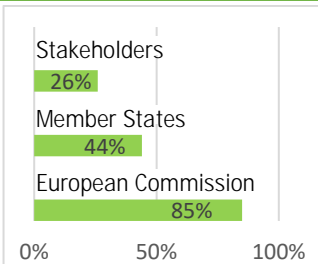
Specific actions by stakeholders include:

- 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 SME advancing sustainable tourism, culture, and gastronomy by organising a forum to connect global stakeholders, enhancing the visibility of underexplored destinations and promoting tourism ventures (see example box);
- an international organisation developing series of podcasts on issues relating to the transition of the tourism industry.

#### Example pledge with reported progress by Viajar es Mundial

‘Our commitment is focused on contributing to the dissemination, recovery and consolidation of sustainable tourism, culture, and gastronomy, with respect for interculturality, inclusion and care for the environment. Since 2020 we have designed and carried out the Ibero-American Forum on Sustainable Tourism, which brings together managers of institutions and companies at the European and global level, to transfer the different actors in the field of business and citizens, the actions that are being carried in the field and transmit messages to citizens that sensitise them toward more sustainable behaviours as consumers. Our purpose is to strengthen alliances with media and/or journalists starting with colleagues from Spain, Portugal and France with the aim of developing by 2024 a large network of networks to contribute worldwide dissemination of sustainability that allows to give visibility to low-exploited destinations with great potential, and the development of a programme that promotes ventures in the tourism sector’.

Progress indicators for topic 20 by 2024 based on reported efforts		Change indicator: number of participants in the open stakeholder events informing about the transition pathway									
 <table><thead><tr><th>Indicator</th><th>Progress (%)</th></tr></thead><tbody><tr><td>Stakeholders</td><td>26%</td></tr><tr><td>Member States</td><td>44%</td></tr><tr><td>European Commission</td><td>85%</td></tr></tbody></table>	Indicator	Progress (%)	Stakeholders	26%	Member States	44%	European Commission	85%	Base value in 2022	304 people (first year), 1415 in 2023	
	Indicator	Progress (%)									
	Stakeholders	26%									
	Member States	44%									
European Commission	85%										
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>
<b>EU Agenda 2030 invites Member States to:</b>	
<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 a diverse array of new skills.

**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 December 2024, there were 507 ongoing projects matching the keyword ‘tourism’. Project calls are open for well-designed cooperative education development activities under this funding programme.

#### Member State example: Spain

Spain has introduced a new Plan for training digital skills in the tourism sector with several key objectives: 1) To design training actions that enhance digital competence in response to industry demand, 2) To identify competence levels aligned with learning outcomes across different tourism roles, 3) To create tiered training that builds knowledge progressively, 4) To encourage private sector collaboration in designing training and developing customisable, tech-driven learning pathways, and 5) To tailor training to the specific needs of various companies in the sector.

- 322 ongoing projects fall under Erasmus+ Key Action 1 (KA1) on learning mobility of students and educational staff. 38% of these projects are linked to VET and 21% to higher education.
- 185 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. 13% of these projects are linked to VET, 6% to adult education and 16% to higher education.

In addition, the T4T expert group (Resilience sub-group) addressed this topic in the last quarter of 2024. They produced recommendations to Member States and the Commission following a [webinar](#) held on 9 December 2024.

Furthermore, the Commission held a large-scale webinar on tourism and skills, with tourism and hospitality educational institutes in February 2024. Over 100 institutes

attended, with many expressing interest in participating in a network of schools to improve information exchange on education, training and mobility.

**Member State action:** a total of 7 Member States consider it a priority to develop skills profiles and curricula for tourism education and training and 13 Member States have introduced measures in this area. Moreover, 13 Member States have shared their [practices](#) in their TAC reports and 1 (Estonia) has also made a pledge on this topic.

**Stakeholder action:** key figures for transition pathway topic 21 pledges:

19 pledges	11 Member States	9 organisation types	21% completed/ with results
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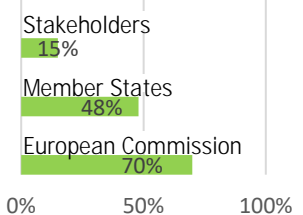
Specific actions by stakeholders depend on their role and operating context. They include:

- 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;
- 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 IN2destination Research & Consultancy in Tourism

'IN2destination engages with educational organisations, such as universities and vocational schools, to promote sustainable tourism education and develop training programmes for tourism professionals. Our actions include collaborating with educational institutions to integrate sustainable tourism principles into their curricula, organising workshops and training programmes for tourism educators, and providing mentoring support for students interested in sustainable tourism careers. Our concrete target for 2030 is to participate in the process of transforming at least 2 tourism training programmes to match the skillset needed in the market.'

Reported progress: IN2destination's CEO is teaching tourism measurement and business communication at the University of Lucerne. We have also trained a public administration's tourism team in AI marketing. And 42 SMEs.

Progress indicators for topic 21 by 2024 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 15%</p> <p>Member States 48%</p> <p>European Commission 70%</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 <a href="#">website search</a>

## 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 – large-scale skills partnership (LSP) for the Tourism Ecosystem in 2022, with more than 80 signing members by the end of 2024. The key targets for the LSP 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 and public sectors and tourism and hospitality educational institutes. Erasmus+ funding supports the large-scale skills partnership through funding the PANTOUR blueprint implementation project and PacTS4ALL coordinating project and can also support the establishment of local partnerships.



**Member State action:** a total of six Member States considered establishing regional and local skills partnerships for tourism a challenge, and for eight it is a priority. Nine Member States introduced measures in this field. Some five Member States shared their [practices](#) through TAC reporting and one (Malta) also presented a pledge.

**Stakeholder action:** key figures for transition pathway topic 22 pledges:

24 pledges	10 Member States	9 organisation types	17% completed/ with results
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Specific 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 (see example box below);
- 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.

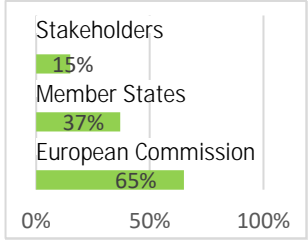
#### Example pledge with [reported progress](#) by Regione Liguria

Regione Liguria, with its Job Sector, has realised the Pact for Job in Tourism. It's a system created in 2018 to offer support to a strategic sector for the socio-economy of Liguria, favouring seasonal adjustment processes and the extension of the working period of seasonal workers. In agreement with workers' unions, private companies in the tourism sector can apply for employment bonuses for hires lasting at least 6 months a year. This Pact has produced good results and has become a best practice for other regions. Regione Liguria intends to continue with this pact to favour the employment level of the tourism sector and the quality of tourist reception. Each year an amount from 3 to 5 million euro is needed to adequately finance the public notice.

For skills in tourism there is not a 'Pact Agreement', but actions towards training of tourism professions and improvement of skills, especially in the sustainable field. Regione Liguria, with its Tourism Sector, Training Sector, Alfa (Regional Agency for Employment, Training and Accreditation) and with the main associations of tourism professions, works for the qualification of outdoor professionals, as a necessary improvement of the reception in Liguria destination and a support to the increase of sustainable tourism. Professional figures related to the outdoor segment include GAE (Hiking Guide), Tourist Cycling Instructor, Off-road Cycling Mountain bike Instructor and Marine Naturalist Tour Guide. Regione Liguria commits to continue raising awareness among training institutes and listening to training needs, especially of young people, in order to have new specialised figures who can lead to the conscious discovery of the territory.

Thanks to the activation of specific courses, n. 130 new professionals relating to the outdoor segment have been trained and qualified in 2023. The accredited institutions are going on with further editions of the courses, therefore the inclusion of new professionals is expected in 2024 to improve the sustainable fruition of the territory.



Progress indicators for topic 22 by 2024 based on reported efforts	Change indicator: number of established national/regional skills partnerships in tourism	
	Base value in 2022	3 in 2022, 6 in 2023, 9 in 2024
	Expected for 2025	12 (aiming for even growth of 3 partnerships per year)
	Source	DG GROW desk research and <a href="#">NATIONAL REGIONAL SKILLS PARTNERSHIPS - PANTOUR</a> ( <a href="https://nexttourismgeneration.eu">nexttourismgeneration.eu</a> )

### 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.

Going live in September 2024, the [Transition Pathways Platform](#) is a new way to provide industrial ecosystem stakeholders (across the EU and for different types of public and private stakeholders) with easy access to the knowledge, resources and connections that support them in their transition to make their services and operations more green, digital and resilient.

The Transition Pathways Platform has native content but also links to other sources of information (websites, platforms, social media), and it will aggregate information as a ‘one-stop shop’ providing a user-friendly entry point for stakeholders to:

- 1) access actively updated information and links to official and community resources relevant for the tourism ecosystem (news, articles, legal documents, policy, strategy, and studies);
- 2) find constantly updated knowledge on ongoing projects, activities, and events relevant for tourism stakeholders;
- 3) provide a mean to connect with and work together with the members of the stakeholder community (pledges and best practices; community interaction and networking);
- 4) search or be alerted about topical current funding and learning opportunities or other developments (funding and support; knowledge and learning).

**Member State action:** this action was included as new question in the 2024 TAC reporting. A total of 11 Member States consider supporting learning opportunities and best practice exchange for tourism SMEs a priority and 9 Member States have specific measures to address this issue. A total of eight Member States shared their [practices](#) through TAC reporting and one (Estonia) submitted a pledge.

#### Member State example: Greece

The Greek Ministry of Tourism plans to run a project funded by the Recovery and Resilience Facility aiming at the upskilling and reskilling of the human resources of the tourism sector. Its main purpose is, through brief vocational programmes, to equip the workforce of any age with the skills needed in the labour market as well as with skills in line with the green and digital transition of the EU. During 2023, (a) the Joint Ministerial Decision 10019/17.5.2023 (Gov. Gazette B’ 3428) for submission of applications, including certification requirements and evaluation procedure for the participants of the courses, was issued and (b) the electronic platform for applications was set up by Computer Technology Institute and Press ‘Diophantus’. The first cycle of courses (out of four at the most) is expected to begin by the end of 2024.

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

33 pledges	12 Member States	10 organisation types	21% completed/ with results
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Specific actions by stakeholders depend on their operating contexts and objectives 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;
- 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.

**Commission action:** the [Transition Pathways Platform](#) published in September 2024, is intended to become a key resource and information hub for the Pact for Skills large-scale partnerships – for tourism and similarly for other ecosystems (should they wish to use this function).

There is a specific functionality (tab) on ‘knowledge and learning’ that shall inform about Training courses (online training resources), events and learning resources (skills/upskill/reskill), best practice sharing, and other learning opportunities, and it will be updated by the Admin of the Platform as well as with the contribution of stakeholders.

It will also have links to skills partnerships for tourism stakeholders under the Pact of Skills; Erasmus for young entrepreneurs; EU Digital Skills and Jobs platform; PANTOUR; and the UNWTO Academy.

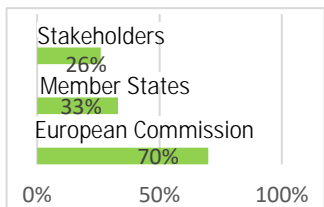
### Example pledge with reported progress by EcoMarine Malta

'[...]In our tours, we follow simple rules to approach dolphins, which helps us minimise our impact and disturbance on the species. Moreover, we share with our guests the good practices and the correct way to interact with wildlife. We also work on involving other players in Marine Tour industry to follow the Code of Conduct,

In 2023-2025 we will:

- Before the summer each year Organise one webinar for the general public and one webinar for teachers to involve schools.
- We will write four blog posts in March, April, June and July about the importance and the pros of following the Code and what species is possible to encounter in Maltese waters.
- We will present the Code of Conduct during our tours to all our guests and show them how to apply it
- Yearly we will provide two workshops and explanatory meetings other marine tour operators to improve their offers towards more sustainable services.
- We commit to Report to the authority any illegality we observe'

Reported progress: We are participating in the @Fins Into the Water project to promote the dissemination of ocean literacy principles, with a focus on water sports centres and stakeholders actively engaged in marine act.

Progress indicators for topics 11+23 by 2024 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									
 <table><thead><tr><th>Entity</th><th>Progress (%)</th></tr></thead><tbody><tr><td>Stakeholders</td><td>26%</td></tr><tr><td>Member States</td><td>33%</td></tr><tr><td>European Commission</td><td>70%</td></tr></tbody></table>	Entity	Progress (%)	Stakeholders	26%	Member States	33%	European Commission	70%	Base value in 2022	Not applicable (platform to be launched in 2024), platform launched September 2024	
	Entity	Progress (%)									
	Stakeholders	26%									
	Member States	33%									
European Commission	70%										
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 Commission is currently developing a ‘[Pilot Project](#) - Capacity Building for Tourism’ with the aim to provide EU Tourism stakeholders, mainly SME, better access to EU funding by increasing their awareness of funding opportunities and improving the quality of their bids.

The Guide on EU funding for tourism will be updated and will have an online tool to guide and help search for available funding opportunities.

In addition, by creating a ‘toolkit’ composed by a ‘compendium of Best Practices’, a simple manual on ‘Dos and Don’ts’ and issue ‘Guidelines for improving the quality of tourism stakeholders’ applications to the EU Funding Programmes / Calls’ and Training/Consulting for SME on how to submit a successful bid on EU funding, this Capacity Building aims to guide Tourism stakeholders to increase their success rates in obtain funding and promote Digital and Green transition plans, through existing support funding lines. This contract was signed in December 2024 and will have a duration of 24 months.

The Transition Pathways Platform will provide an integrated access point to information published by different actors including open funding opportunities on different levels (EU, national, regional), and shall make available information in a user-friendly manner on

**upcoming and ongoing funding calls, tenders, grant opportunities**, considering area of work, type and geographic location of organisation.

It makes it possible for stakeholders to share more effectively their projects and to flag interest in creating/joining a *consortium* to access funding opportunities.

The upcoming T4T stakeholder support platform will also 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 10 Member States reported that it is a priority for them

#### Member State example: Austria

In Austria, cooperation with other ministries, departments, institutions and the tourism industry is organised for specific topics either long term via strong coordination at political level supported by a Steering Group for Tourism, permanent working groups or round tables (e.g. implementation of Plan T – Masterplan for Tourism, sustainable mobility, visa, bike tourism), or on a case-by-case basis (e.g. development of new funding schemes, new legislation affecting tourism).

to provide effective information channels where stakeholders can find knowledge, resources, and funding opportunities, and 16 Member States have specific measures to address this issue. A total of 7 Member States shared their [practice](#) through TAC reporting.

**Stakeholder action:** key figures for transition pathway topic 27 pledges:

11 pledges	4 Member States	8 organisation types	18% 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 disseminating best practices linked to sustainable tourism, (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.

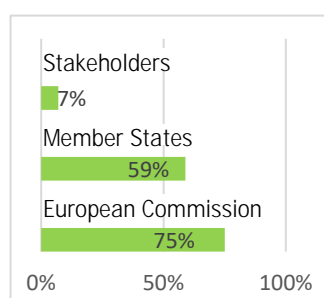
### Example pledge with reported progress by European Greenways Association

‘EGWA commits to:

- a) disseminate best practices from EU-funded projects linked to sustainable tourism, to inspire new projects, producing and disseminating at least 8 news on examples of EU funded projects until 2025 (2 news /year), and inform members of updated information on funding opportunities for tourism.
- b) Promote at least 2 new projects on sustainable tourism, greenways related, with European funds; from 2022 -2025 (ongoing).’

Progress indicators for topic 27 by 2024 based on reported efforts

Change indicator: number of open tourism-related funding calls notified to stakeholders



Base value in 2022

68 open calls in 2022 notified through the [Guide on EU funding for tourism](#)

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 2025 onwards T4T platform reporting on tourism funding calls



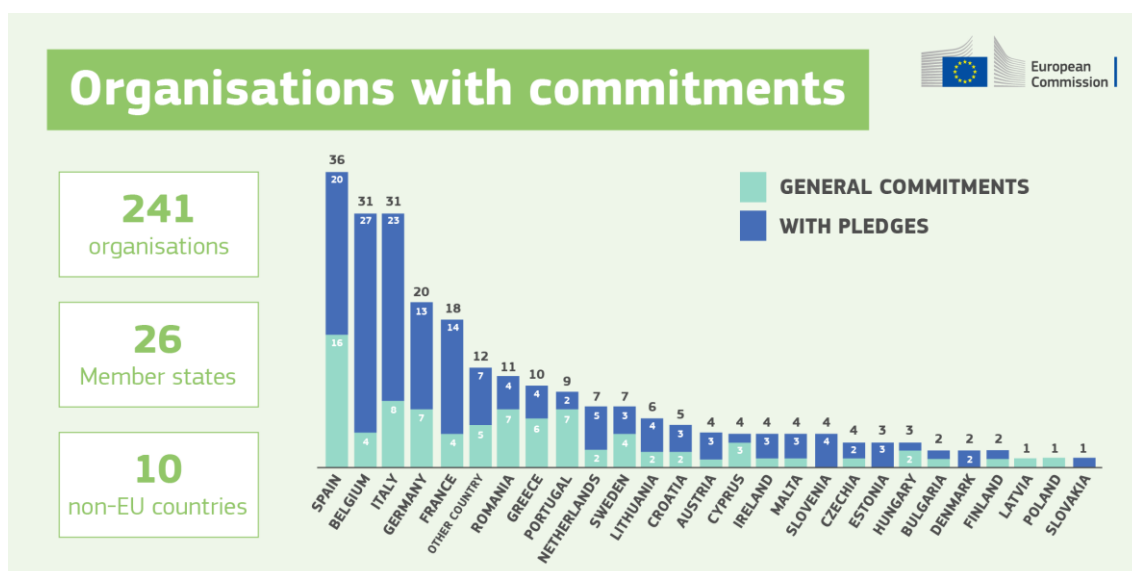
### 3. Stakeholder engagement analysis

As shown in 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 diverse types of stakeholder organisations. With a basis of 529 published pledges in August 2024, it is possible to provide some overall insights and make suggestions for further developing stakeholder engagement and collective progress in achieving the transition pathway objectives.

#### 3.1. Commitment to the vision and pledges to take action

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

By August 2024, 241 organisations expressed their support for the transition pathway, and 64% of these (154 organisations) formulated and submitted concrete pledges with expected results. Figure 6 shows the countries of origin of these organisations. Belgium leads with the highest number of stakeholders making specific pledges (27), which can easily be explained by the many EU-level network organisations or NGOs based in Brussels. The other largest countries of origin (Spain, Italy, Germany and France) are the largest tourism countries in the EU, accounting for 62% of the total nights spent both by residents and non-residents of the country in 2023. Altogether, these five Member States count for 63% of organisations with pledges.



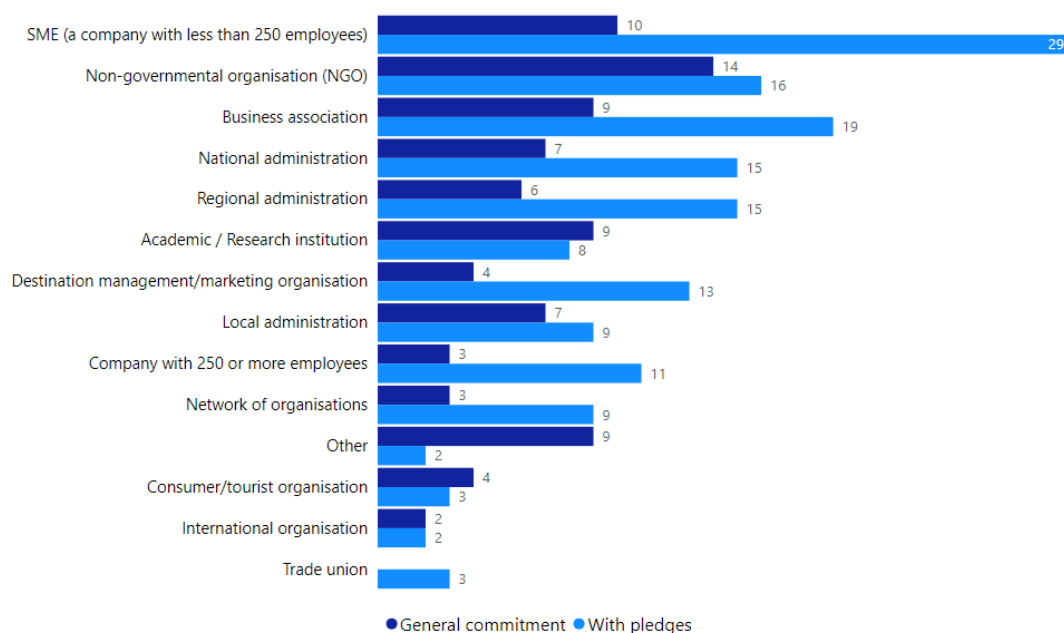
**Figure 6: Number of organisations with general commitments or pledges**

To broaden the impact of the transition pathway across the EU, it is important to encourage more organisations to make pledges, especially organisations from countries where tourism plays a key role in the economy and from which 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 Luxembourg.

Interestingly, organisations from non-EU countries also expressed their interest in supporting the transition pathway for tourism. A total of 12 organisations (5% of all organisations) from 10 countries (Albania, Bosnia and Herzegovina, Japan, Liechtenstein, Montenegro, North Macedonia, Norway, the UK, Switzerland, and the US) expressed their commitment, and of these, 7 organisations made 15 specific pledges.

### 3.2. Pledge submitter diversity across topic areas

Both the private and public sector 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 101 pledges (19% 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 7: Pledges and commitments by type of organisation**

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 services aiming to improve their own competitiveness. However, all organisation types are pledging to take action on more than one area, demonstrating that they see themselves as contributors to all key dimensions of the transition.

The Commission has supported this process by sharing examples of these innovative organisations with those who are still reflecting on how the transition pathway could link to their daily work and challenges. Since 2022, the Commission has organised [stakeholder events twice a year](#) to share 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, international organisations and consumer organisations are increasingly 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 second stock-taking exercise have highlighted that a lot of efforts with significant impact on the transition pathway for tourism also take place outside of collected stakeholder pledges. In particular, there are several tourism-relevant projects implemented under EU funding programmes and by other national and

international funding mechanisms. See, for example, a selection of projects contributing to the green transition of tourism, as found in the [2024 EMI report on tourism](#):

#### Energy Efficiency and Renewable Energy Adoption in tourism facilities

##### Photovoltaic installation on the building of Hotel Irys (Poland) <sup>(12)</sup>

The project's goal is to achieve energy independence for the hotel Iris located in Lublin. This initiative aims to ensure that a significant portion of the required energy will be generated from renewable sources, specifically solar power. Additionally, any excess energy produced will be sold to the grid. The project will involve purchasing fixed assets, installing a photovoltaic power plant with a capacity of at least 10.5 kW, and connecting it to the grid.

#### Testing new solutions for sustainable tourism

##### Zero-impact tourism between water and land: modular amphibious dwellings, environmentally sustainable housing for the eap delta and the venice lagoon (Italy) <sup>(13)</sup>

The project aims to develop an innovative and eco-friendly solution for sustainable tourism by introducing temporary modular housing systems on floating barges, designed for use in natural environments like the Venice Lagoon and the EAP Delta. The concept emphasises harmony with the surrounding environment, utilising natural materials to minimise ecological impact. These modular structures will seamlessly integrate into the landscape, offering a low-impact, flexible housing solution that adapts to the natural context. The project strives to create a sustainable tourism model that respects and preserves the environment while providing unique, immersive experiences for visitors.

Source: Technopolis Group based on the Kohesio dataset

The Table below provides examples of different types of projects funded under ERDF and classified as supporting the digital transition in tourism.

#### ERDF projects - examples

##### Tourism and Hospitality Digital Transformation: Efficiency gains

Online reservation and geoinformation system of eABM <sup>(14)</sup> (Czechia)

The project involves the development of a three-tier sales and information system, branded as 'navig.me,' designed to operate in a client-server mode. It will be available as a cloud-based web service or as an installation package for Windows, Linux, and iOS operating systems, as well as for mobile platforms including Apple iOS, Android, and Windows Mobile. The system is a comprehensive solution for booking and selling tickets, offering unique features, providing a seamless and efficient user experience across multiple devices and platforms.

##### Tourism Data Management

New digital travel agency (Finland) <sup>(15)</sup>

This project aims to enhance the operations of Ikalisten Travel Office's new digital travel agency by developing real-time booking capabilities during trips and delivering personalised customer experiences. It focuses on increasing digital interaction with customers and managing customer sentiment to create added value for the entire tourism value chain. The project's development efforts are centred on advanced data management to optimise customer engagement and service efficiency.

##### Cultural Heritage and Digital Education

Closer to culture. Digitisation of representative collections of the National Museum in Krakow for e-culture and e-education (Poland) <sup>(16)</sup>

The project aims to digitise and promote the valuable collections of the National Museum in Krakow (MNK) to enhance Polish cultural heritage visibility both in Poland and internationally. Key objectives include:

1. Preserving objects for digitisation.
2. Developing IT infrastructure for data storage, sharing, and processing.
3. Digitising representative objects from the Museum's collections.
4. Enhancing the database with new functionalities and metadata.
5. Translating selected metadata into English.
6. Creating a digital platform to showcase the Museum's digitised content.
7. Implementing targeted promotion strategies to reach diverse audiences.

##### Smart cities and public services

Promote the offer of services based on cultural heritage, associated with the digitisation of the same and its application to the tourism sector (Spain).

The project aims to create a platform that enhances municipal management by improving the collection, maintenance, and sharing of geographic information related to the city. This platform will support the storage, processing, access,

<sup>(12)</sup> <https://kohesio.ec.europa.eu/en/projects/Q6726070>.

<sup>(13)</sup> <https://kohesio.ec.europa.eu/en/projects/Q2074763>.

<sup>(14)</sup> <https://kohesio.ec.europa.eu/en/projects/Q19703>.

<sup>(15)</sup> <https://kohesio.ec.europa.eu/en/projects/Q3756463>.

<sup>(16)</sup> <https://kohesio.ec.europa.eu/en/projects/Q87007>.

### ERDF projects - examples

and distribution of spatial data, with a focus on protected assets, tourism sites, and local services, ensuring interoperability standards.

The T4T expert sub-groups and the stakeholder support platform are also helping take stock of the extent and key results of this work. Such a broader analysis will support the preparation of the three-yearly report on the progress of the EU Agenda for Tourism 2030 and help identify needs for further work and support.

## 4. Other issues

In addition to the 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. 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 in 2022. 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 the 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, 55 (10%) refer to climate, demonstrating the importance of this aspect cutting across ‘green transition’, ‘resilience’ and ‘policy and governance’ dimensions of the transition pathway.

In March 2024, the Commission published a Communication on [Managing Climate Risks – Protecting people and prosperity](#), following a first ever [European Climate Risk Assessment](#). The EU Mission on Climate Adaptation gathers knowledge and data, projects and community practices, including on tourism. An ETC [survey](#) of June 2024 gives insights into the impact of climate events on traveller’s choices, reporting that 76% of respondents adjust their travel habits according to climate change.

Other key reports on estimating and addressing the long-term 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](#), completed in 2024, also addresses crisis preparedness for extreme weather events, such as extreme temperatures and floods. The Partnership of Sustainable Tourism under the Urban Agenda for the EU agreed to prepare guidelines for enabling climate-friendly and resilient urban destinations.

To raise further awareness and bring out good practice, in October 2024, the T4T expert group held a webinar ‘Weathering the storm: the evolution of European tourism in a

changing climate’ and the Commission hosted a workshop under the EU Week of regions on ‘Tourism regions addressing climate change risks’.

Closely linked to climate change impacts and mitigation and adaptation needs, is the urgency of addressing **water resilience**. The extended and more frequent periods of drought in some regions, floods in other areas, and overall fresh water scarcity in Europe, affecting 30% of Europeans, have significant impacts on the tourism ecosystem that needs to both adapt to the challenges with reinforced water saving and efficiency measures and to act responsibly by contributing to water saving and reduced pollution, thus showing solidarity with host communities. Awareness raising is one of the key complimentary actions: in 2024, the Commission launched the awareness campaign [#WaterWiseEU](#) and a dedicated EU Green Week to water resilient Europe. The Commission can contribute further by gathering good practices.

Also linked to climate change is the need to rehabilitate degraded areas, restore and revitalise cultural monuments and conservation of natural habitats. The recent accumulation of natural disasters (floods, earthquakes, volcanic eruptions, landslides) compounds the problem. Local authorities, destination marketing organisations and SMEs face major challenges addressing such crises, especially in underinvested and outermost regions. Support offered by the EU Solidarity Fund and other funding mechanisms for crises management can help regions facing such challenges.

Biodiversity also plays a critical role in enabling tourism and recreation.

Firstly, it provides the green spaces that people want to spend time in for their health and well-being.

Secondly, it ensures the resilience of these green spaces in the face of environmental change, including a changing climate.

Thirdly, it maintains and provides a wide range of other nature benefits or ecosystem services of which tourism and recreation depend on, such as clean air and water, food, and mitigating the impacts of extreme weather events such as floods and drought.

A tourist’s appreciation of nature and the business opportunities it represents has made the tourism and recreation sector actively initiate and/or support nature conservation action in many places. At the same time, tourism activities might hamper or reverse biodiversity conservation efforts.

The Commission has created a new licensing system for the use of the Natura 2000 logo on any goods and services that come from, and contribute to, the conservation of Natura 2000 sites. The logo does not serve as a certification of the quality of the product or service. The aim is not only to make products and services originating from Natura 2000 sites better known to the public but also to give greater recognition to all those who are harvesting the natural resources within Natura 2000 in a way that fully supports the conservation objectives of the site.

**Unbalanced tourism** (overtourism) was a prominent challenge in some hot-spot destinations during the summer season of 2024. Already a systemic problem in the pre-pandemic, in some destinations (e.g. the Canary Islands) it returned causing great concerns among host communities and local governments, particularly after the rebound of



international travel in the post-pandemic years and a strong tourist demand. Media highlighted the problems that destinations are facing, to which overtourism has been contributing in the long run: rise in rental prices and lack of affordable housing, overall gentrification, damages to historic and natural attractions, unrespectful and irresponsible behaviour by some tourists. It is a complex phenomenon, with roots and implications going beyond the EU tourism ecosystem, therefore should be tackled accordingly, in collaboration with other sectors at the destination, at all levels, based on sound data, sustainable planning and resident community involvement.

Sharing knowledge, good practice and effective measures are key in prevention and mitigation of overtourism. Stakeholders agree that this challenge should not lead to overall rejection sentiment and a negative portrayal of tourism.

Overtourism by many stakeholders is considered as part of a bigger challenge – unbalanced tourism growth: some areas that are remote, undergoing industrial changes, with few other economic alternatives would benefit from attracting more sustainable tourism.

**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 and accommodation.

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.

In the second half of 2023, the Spanish Presidency of the Council 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 and included 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 brought back, and even intensified, overtourism in some tourism destinations. Stakeholders 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.

**Artificial intelligence and its applications in tourism.** AI improves the tourist experience by personalising trips and offering unique experiences, while also serving as a valuable ally for destination managers in optimising what the tourism industry has to offer, as well as anticipating its trends. Its uptake by tourism operators, however, is not straightforward, as it implies higher costs, the understanding of advanced technical and legal implications, and the provision of high volumes of high-quality data. More support is needed for SMEs and destination management organisations to feel confident in investing in AI and unlocking its potential to improve operations, services, decision-making, and strategic planning.

As part of its new Tourism strand, the G7 has produced a high-level paper on AI and tourism, endorsed during the first G7 Tourism Ministerial on 15 November 2024.

Linked to digitalisation is the emerging ‘digital divide’ with the use of smartphones for travel and the increasing obligation to purchase tickets online due to the closure of train or bus ticket offices, and the possible limitations this implies for travellers and tourists with limited digital and/or language skills.

**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.

## 4.2. 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 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.

- In 2024, under the Recovery and Resilience Facility (RRF), the approved Member State plans show that approximately EUR 13.25 billion (2% of the total RRF funding) is estimated to be invested in the tourism ecosystem by 19 Member States.
- In the 2021-2027 period, Member States and regions have allocated 4.2 billion EUR<sup>(17)</sup> to sustainable tourism support under programmes funded by the European Regional Development Fund (ERDF), including its European Territorial Cooperation strand (Interreg). Support has been programmed primarily under the ERDF Specific Objective 4.6 and is dedicated to sustainable tourism and culture under Policy Objective 4 (‘a more social and inclusive Europe’) or as part of

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<sup>(17)</sup> 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/>.

integrated sustainable territorial development strategies in urban and non-urban areas under Policy Objective 5 ('a Europe closer to citizens'). These are key resources supplemented by other EU programmes under which funding 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 40.7 million EUR. A further 6.9 million EUR has been allocated for tourism SMEs in 2024.
- In 2023, as a part of European Maritime Fisheries and Aquaculture Fund Programme, the Commission launched a call for proposals to support sustainable maritime and coastal tourism in the outermost regions. This resulted in the selection of two projects involving four outermost regions, one on blue tourism <sup>(18)</sup>, and the other on underwater archaeological heritage <sup>(19)</sup>, with a total support of 2 million EUR.
- The European Parliament has provided budgetary support, which has made possible several pilot projects and preparatory actions, as well as a 10 million EUR budgetary top-up to the 2022 SMP budget for tourism. Their support amounted to 21 million EUR between 2021 and 2023. In 2024, the European Parliament allocated 15 million EUR for tourism pilot projects and preparatory actions.

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 must comply with for their activities to count as sustainable activities under the EU taxonomy.

The 2024 [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.

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(18) TwinnedbySTARS.

(19) ecoRoute.

### 4.3. Optimising synergies and the impact of results

This stock-taking report has demonstrated that 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 sharing of best practice.** 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 are being played by:

- the T4T expert group and sub-groups, by supporting focused exchange sessions on best practices;
- the online stakeholder support platform, by making best practices visible and discoverable across actors based on their interests in a user-friendly manner;
- the pilot project on [Sustainable EU Tourism Destinations](#) launched in 2023 with the support of the European Parliament, providing 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 UN Tourism's [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 second stocktaking analysis of the progress of the [transition pathway for tourism](#) since it was developed through an eight-month-long co-creation process in 2021 and published in February 2022.

Now, nearly three years on, this stocktaking effort continues to follow a similar inclusive approach and asked a wide array of tourism stakeholders, including Together for EU Tourism experts and Member States for their contributions on evaluating the progress and what to include. It also contributes to the follow-up of the [EU Agenda for Tourism 2030](#), which contains a multiannual workplan aligned with the transition pathway topics. As the coverage of TAC reporting is continuously improved in the coming years, progress and good practices of Member States' administrations' work towards these strategic objective will be better captured.

It should be recalled that the final published transition pathway for tourism with 27 topics and 70 actions was a balanced compromise between the interested of all involved actors and the need to present concise messages. The report could not reflect the entirety and richness of the co-creation discussions and had to be grouped at a more general level. The collected pledges until now are allowing the richness of the needs and potential to act towards achieving common goals by showing relationships between topics, and how one topic can include several different objectives. It is possible that many pledges could fall under more than one topic, but the monitoring of progress remains structured under the 27 topics in the pathway.

This second report continues to follow the practical method to observe different aspects of progress towards each transition pathway area, as in the first stocktaking report, clarifying that all groups of actors have an active role to play. Progress can be compared between actors to some extent but also to follow progress annually. The indicators proposed and their selection depended on data availability, which is improving across the EU but work continues on this topic (improving availability of tourism data and statistics).

The analysis and consultations with Member States and stakeholders show that currently, the most advanced areas of collective work remain:

- 1) establishing tourism strategies that consider the economic, environmental and social impacts of tourism;
- 2) improving statistics on measurement of tourism impacts;
- 3) providing green and digital transition support for SMEs and destinations; and
- 4) boosting the digitalisation of SMEs and destinations.

Progress has also increased significantly on awareness-raising of skills needs and the twin transition overall. Progress analysis also shows that all groups of stakeholders have engaged on all transition pathway topics. Pledgemakers have engaged to a lesser extent, understandably, on those topics that were mainly targeted for Commission action (e.g.

travel restrictions, multimodal transport), suggesting that the formulation of transition pathway objectives and actions has an impact on how stakeholders are mobilised. And the more pledges that are received and are considered as under progress, the less progress is visually demonstrated. Nevertheless, engagement to the transition pathway topics can be considered stronger.

By August 2024, 26 out of 27 Member States, together with 10 other countries, have been engaged either through a pledge or general commitment to the transition pathway. However, not all are taking concrete action or sharing their progress yet with peers. In this collaborative effort, sharing concrete actions with measurable and clear targets should be encouraged and welcomed. Awareness of this collaborative call for action should continue to be extended. Member States play a role in raising awareness and calling for action in their regions, and the [T4T expert group](#) also delivers these messages to their networks.

While the topics in the transition pathway do not pretend to cover all aspects needed for the twin transition, the current topics do help serve as a guide for the work of tourism stakeholders and help the Commission to assess progress in the transition. This report aims to provide a useful overview for policymakers and stakeholders at European, national and local levels, providing concrete examples of ongoing activities towards the transition. Updates of indicators this year and next should provide comparable and cumulative information as input to the first three-yearly report on the [EU Agenda for Tourism 2030](#) to the Council, in addition to a separate external stocktaking study on the topic.

Commissioner Tzitzikostas in his designation hearing before the EP's Transport (TRAN) Committee highlighted their priority to develop a Sustainable Tourism Development Strategy, building on the Transition Pathway and the European Tourism Agenda 2030, the report that will be presented to the Council by end 2025 and following a large consultation process with the tourism stakeholders.

The strategy should also address emerging issues such as unbalanced tourism and climate change. The Commission and Member States' strategies would subsequently need to be aligned in terms of priorities and actions. Work is already underway in Member States to update their strategies for the new 2027-2032 perspective in line with the EU budget (MFF). To this end, this second stocktaking report and Member State guidance could be leveraged to start a reshaping progress for this Strategy as a collaborative process with all key tourism stakeholder groups, which now have significant experience with working together towards shared goals in this process.



## 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
<b>TOPIC 1</b>	1: Fair measures for Short-Term Rentals (STR)
<b>TOPIC 2</b>	2: Regulatory support for multimodal travelling
<b>TOPIC 3</b>	3: Improving statistics and indicators for tourism
<b>TOPIC 4</b>	4: Comprehensive tourism strategies development or update
<b>TOPIC 5</b>	5: Collaborative governance of tourism destinations
<b>TOPIC 6</b>	6: Sustainable mobility
<b>TOPIC 7</b>	7: Circularity of tourism services
<b>TOPIC 8</b>	8: Green transition of tourism companies and SMEs
<b>TOPIC 9</b>	9: Data-driven tourism services
<b>TOPIC 10</b>	10: Improving the availability of online information on tourism offer
<b>TOPIC 11</b>	11: Easily accessible best practices, peer learning and networking for SMEs
<b>TOPIC 12</b>	12: R&I projects and pilots on circular and climate-friendly tourism
<b>TOPIC 13</b>	13: Promoting the use of PEF and OEF methodology for tourism ecosystem
<b>TOPIC 14</b>	14: Technical implementation for common European data space for tourism
<b>TOPIC 15</b>	15: R&I for digital tools and services in tourism
<b>TOPIC 16</b>	16: Support for digitalisation of tourism SMEs and destinations
<b>TOPIC 17</b>	17: Seamless cross-border travelling
<b>TOPIC 18</b>	18: Coordinated management and updated information on travelling
<b>TOPIC 19</b>	19: Awareness raising on skills needs for twin transition in tourism
<b>TOPIC 20</b>	20: Awareness raising on changes in tourism demand and the opportunities of twin transition
<b>TOPIC 21</b>	21: Educational organisations to engage in developing and renewing tourism education
<b>TOPIC 22</b>	22: Pact for skills in tourism
<b>TOPIC 23</b>	23: One-stop-shop for learning opportunities for tourism SMEs
<b>TOPIC 24</b>	24: Fairness and equality in tourism jobs
<b>TOPIC 25</b>	25: Enhancing accessible tourism services
<b>TOPIC 26</b>	26: Tourism services for visitors and residents alike
<b>TOPIC 27</b>	27: Support visibility of funding opportunities for tourism actors

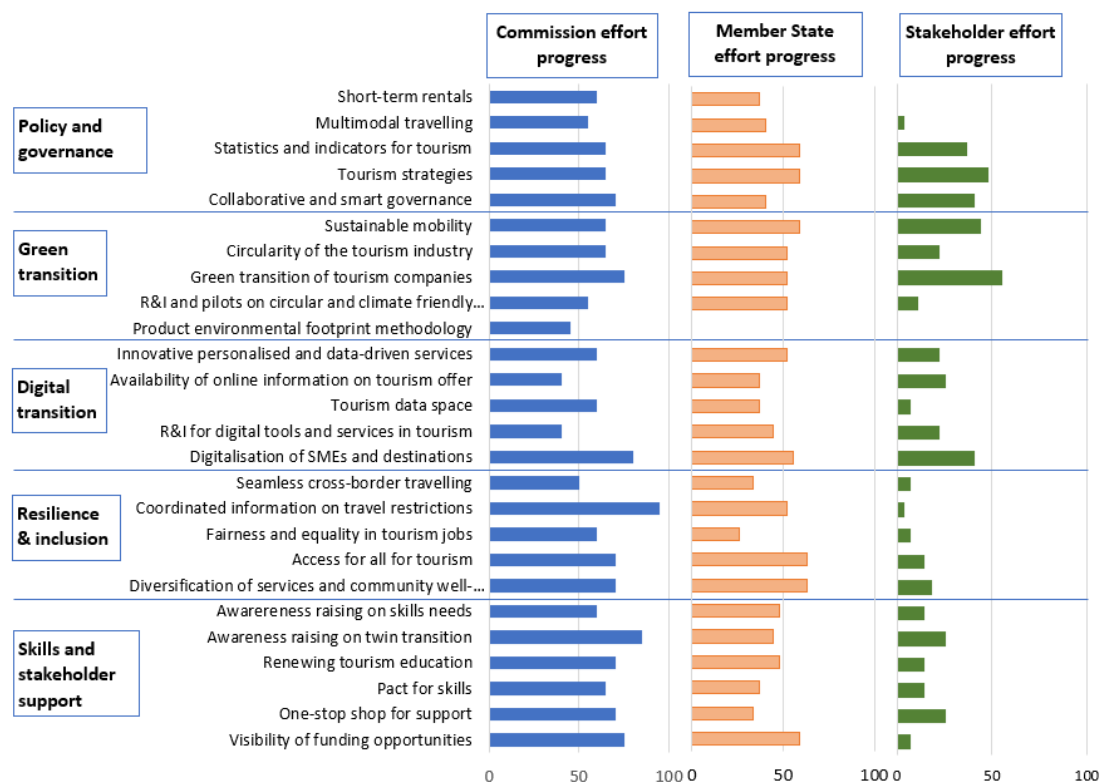
## Annex II: Summary of progress across topics

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 2 in the report. 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.

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 8 presents each stakeholder group's effort progress in the action areas of the transition pathway as estimated using this formula. Figure 11 shows how the progress of each group could be added together, showing a theoretical quantitative 'overall progress' estimation across transition pathway topics.



**Figure 8: Estimated effort progress (0-100%) made across transition pathway topics by key groups of actors**

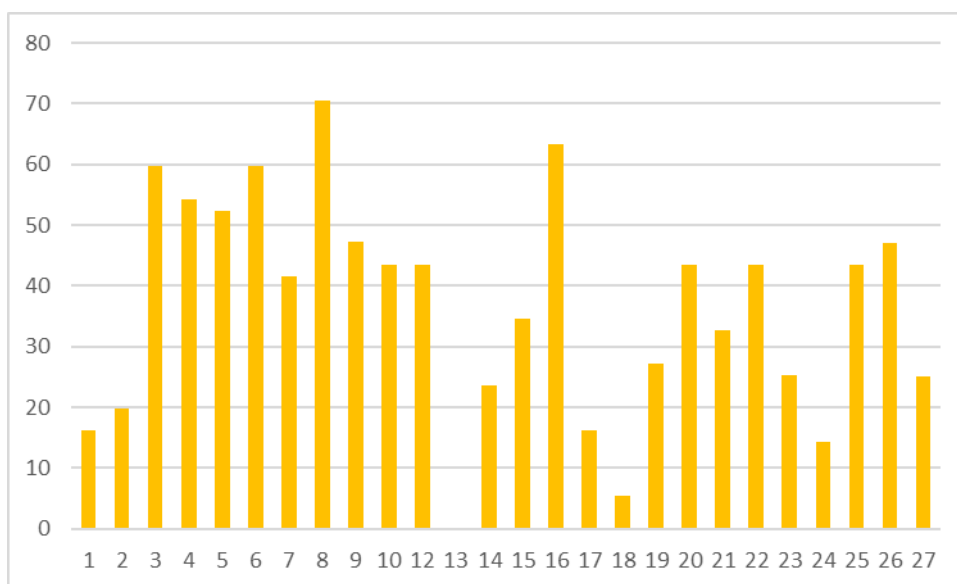
## Number of and progress on pledges

For this stocktaking exercise, the stakeholder organisations who had pledges published in the first five publication rounds (June 2022, October 2022, March 2023, October 2023, and August 2024) were contacted in summer 2024 and were asked to report on their pledge.

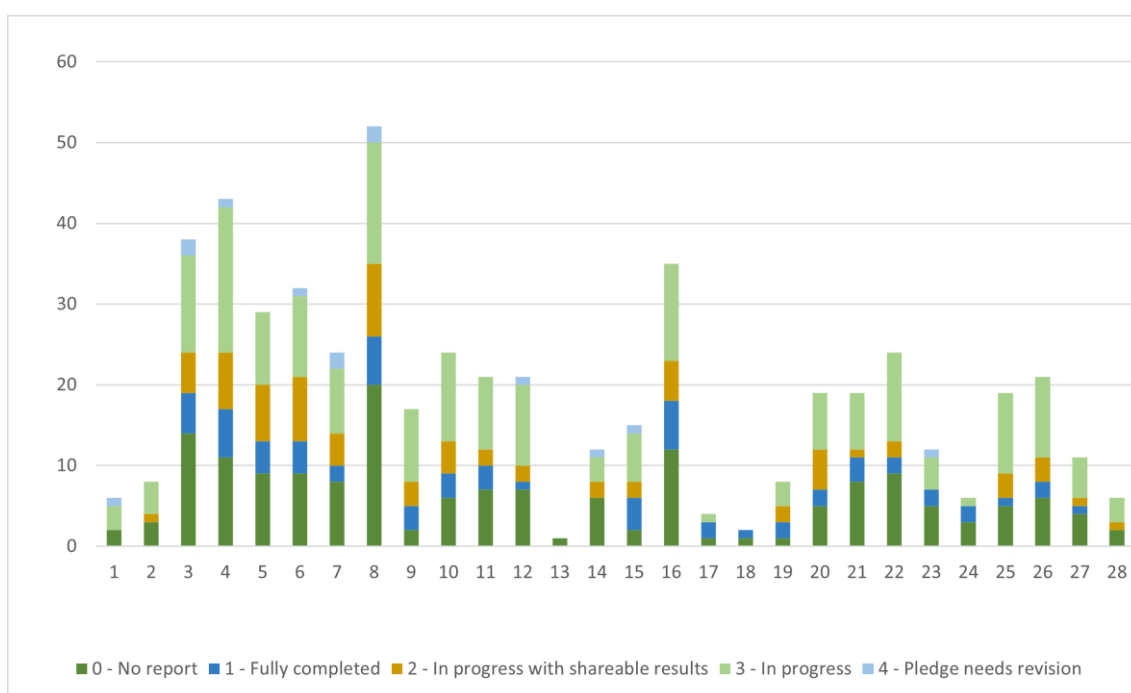
The reporting was structured through an [EU Survey](#) and resulting spreadsheet, giving response options for each pledge to be chosen between: 1 – fully completed; 2 – in progress with shareable results; 3 – in progress; and 4 – needs revision. This information underpins the stakeholders’ ‘pledge results’ element of the progress analysis following the formula found in Table 2. Pledges from the latest pledge publication (August 2024) have been considered by default as ‘in progress’ since they had just been launched.

Figure 9 summarises the distribution of the 529 pledges received by end of July 2024 by reported progress. Of all pledges, 9.8% 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 (8.1%) and improving statistics and indicators for tourism (7.1%). Overall, two years after the first pledge publication, 12% of pledges have reported full completion of their objectives already, and 14% of pledges are in progress with shareable results.

Figure 12 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 9: Number of pledges with their reported progress across topics**



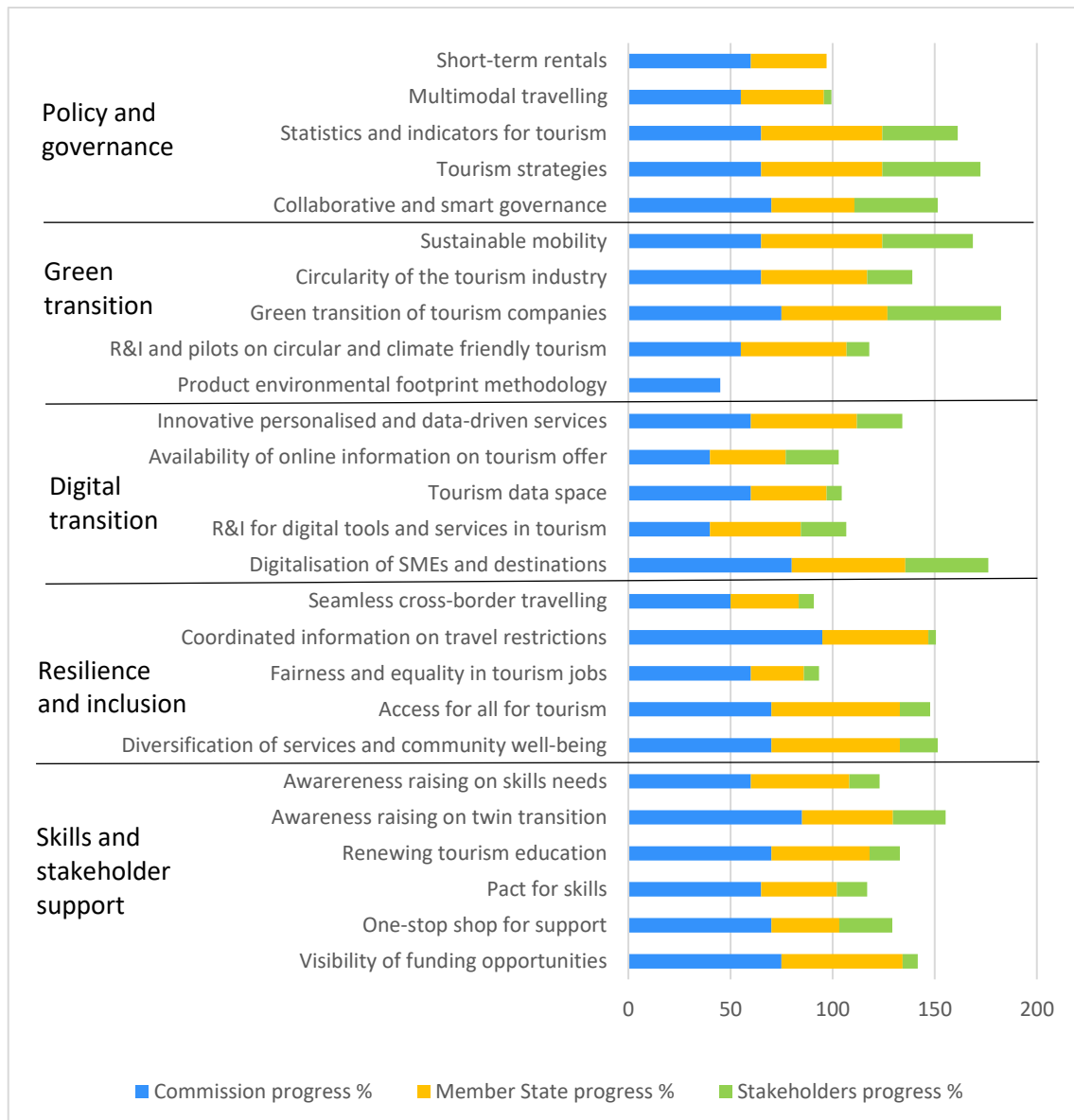
### Overall effort progress across the topics

Based on the progress analysis formula presented in [Figure 13](#) for the key groups (Commission, Member States, stakeholders) it is possible to build an overview picture (see [Figure 11](#)) 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 staunch 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.

### **Figure 10: Engagement diversity index of transition pathway pledges**

When considering the five key areas of transition, most progress was made on policy and governance, green transition, and resilience and skills. 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 11: 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 set up a baseline for the 2024 exercise, which should be updated in the upcoming years. Columns have been added in this year's stocktaking report to reflect values, if available, for 2023 and 2024. If no updated values are available, these boxes are left blank.

Most of these indicators can be updated yearly based on the source indicated. In some cases, the data source used in the current stocktaking 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 three-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)	Value in 2024	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	16 Member States	20 Member States (on path towards all 27 Member States by 2028 following obligation set in Delegated regulation 2017/1926)	<a href="#">NAPCORE</a> annual reports
	Participation of Member States in 3-yearly TSA data collection, number of Member States	23 Member States participated, 11 provided at least 32 indicators (out		25 Member States participating, 20 providing at least 32	DG GROW desk research, Eurostat <a href="#">TSA</a>



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	providing at least 32 indicators for tables 1-7	of 42) for tables 1-7		indicators (out of 42) for tables 1-7	<a href="#">reports</a>
	Member States reporting on tourism strategies updated 2022 or later which include economic, environmental and social sustainability	10 Member States (in 2022 and 2023)	Latest available data are from reporting year 2023	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	16	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)	146.3 million (estimated)	170 million (to support EU target to double high-speed rail traffic by 2030 compared to 2015)	Eurostat table <a href="#">tour_dem_tttr</a>
	Food waste from restaurants and food services per head	12 kg/person (latest value for 2020 and 2021)	15 kg/person (latest value for 2022)	10.2 kg/person (reduction of 15% from 2020 value supporting EU objective to reduce food waste by 30% by 2030)	Eurostat table <a href="#">env_wasfw</a>
	Number of EU tourist accommodation services, which have adopted reliable environmental schemes or labels (see indicator description from <b>EU Tourism Dashboard</b> )	5.652	Latest available data from 2022	8.000 (targeting strong acceleration, 800 new registrations per year)	EU Tourism Dashboard: <a href="#">Adoption of environmental labels and schemes</a>
	Number of ongoing EU-funded R&I projects linking with environmentally sustainable tourism	112; 139 in 2023	157	200 (counting to include also other EU funding programmes than Horizon Europe)	<a href="#">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&amp;I projects on sustainable tourism</a>

Existing product environmental footprint category rules and calculation support datasets for tourism services	No	Ongoing study	Yes	DG GROW desk research
Digital transition				
Take-up of one or more advanced technologies (cloud, AI, big data) by tourism companies	31.2% (survey conducted in 2023)	31% cloud, 20.4% internet of things, 17.3% robotics, 15.3% big data, 13.7% artificial intelligence	48% (on a path to reach 75% by 2030 in line with <a href="#">Digital Decade targets</a> )	<a href="#">Annual EMI project survey of tourism SMEs</a>
Share of EU tourism companies with a website	84% in big data analysis in 2023	<i>This indicator was not updated in the 2024 report – share of EU tourism companies developing AI in-house is 18%</i>	100% (to support <a href="#">Digital Decade target</a> of 90% of SMEs having at least basic digital intensity by 2030, starting with a website)	Annual <a href="#">EMI Tourism report</a>
Number of tourism-related datasets provided by EU Member States at data.europa.eu	4969 (4 December 2023)	9600 (2 December 2024)	7669 (increase of 50 datasets per Member State per year)	<a href="#">Online query to data.europa.eu portal with keyword 'tourism'</a>
Number of ongoing EU-funded R&I projects linking with tourism and digital technologies	99; 133 in 2023	112 (to be updated in Dec)	200 (including also other EU programmes than Horizon Europe)	<a href="#">CORDIS search for ongoing projects in 2022</a> 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)	Latest figures from 2022	70% (in line with the <a href="#">Digital Decade target</a> of 90% of SMEs having at least basic digital intensity by 2030)	Eurostat <a href="#">isoc e diin2</a> table

## Transition pathway for tourism: Taking stock of progress by 2024

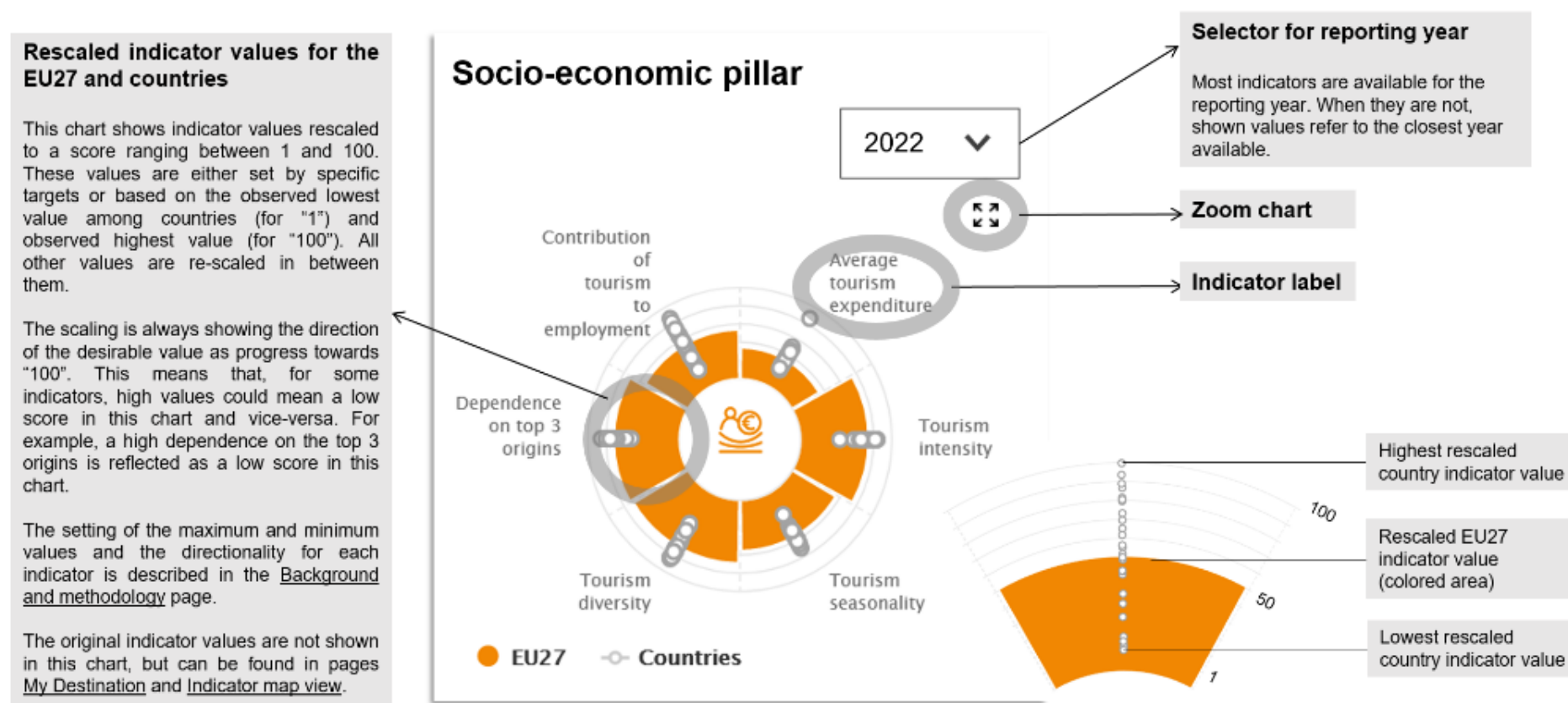
Resilience					
	Number of nights spent by non-EU residents in EU accommodation establishments	418 million extra-EU visitor nights (calculation: visitors from any country – intra-EU)	518 million extra-EU visitor nights (calculation: visitors from any country – intra-EU)	700 million extra-EU visitor nights (return to 2019 level)	Eurostat table <a href="#">tour_occ_ninraw</a>
	Published educational material for crisis resilience including lessons learnt from COVID-19 measures and governance	No	Crisis management study published on DG GROW website	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 28.2%; Women 71.8% (Q4-2023)	Men 27.5%; Women 72.5% (Q2-2024); Men 27.7%; Women 72.1%	Men 36% Women 64% in Q4-2025 (progressing towards equal balance 50%/50% by 2030)	Eurostat table <a href="#">tour_lfsq6r2</a>
	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	Latest figures from 2022	Reducing share of both non-participation reasons	Eurostat table <a href="#">tour_dem_npage</a>
	Tourism seasonality (proportion of nights in 3 busiest months of all tourism nights in a year)	45%	43%	40% (lower value means more equally balanced tourism nights in all months)	EU Tourism Dashboard indicator <a href="#">tourism_seasonality</a>
Skills and stakeholder support					
	Participation of tourism workforce in upskilling or reskilling activities	56.000	Latest available data from 2022	120 000 (10% of the workforce in tourism industries – 12.1 million in 2022)	DG EMPL <a href="#">Pact for Skills annual survey report</a>
	Number of participants in the open stakeholder events informing about the transition pathway	304 people (first year), 1415 in 2023	700 in 2024	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	156 (search on	242 (search on	200 (increasing number	Erasmus+ programme

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with keyword 'tourism' labelled as 'good practice' per activity year	4 December 2023)	2 December 2024)	of good quality tourism education development projects)	<a href="#">website search with keyword 'tourism', activity year 2022</a>
Number of established national/regional skills partnerships in tourism	3 in 2022, 6 in 2023	9 in 2024	12 (aiming for even growth of 3 partnerships per year)	DG GROW desk research and <a href="#">(nexttourismgeneration.eu)</a>
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)	Platform launched in September 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 (63 in 2023) notified through the <a href="#">Guide on EU funding for tourism</a>	57 open calls in 2024 notified through the Guide on EU funding for tourism	150 (EU calls + calls by Member States and regions notified through the T4T stakeholder platform)	' <a href="#">Guide on EU funding for tourism</a> ' and <a href="#">EU funding and tenders portal</a> , 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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