

Webinar “Innovate, Scale, Compete: Europe’s Travel Tech Momentum”

17 March 2026, 15.00 – 17.30 CET

Webinar Summary

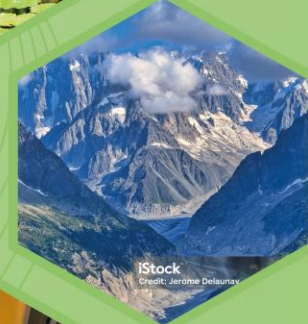




Table of contents

Transition pathway for EU tourism

Introduction	<u>3</u>
Agenda	<u>4</u>
Speakers	<u>5</u>
Webinar in numbers	<u>6</u>
Key discussion points	<u>7</u>
Conclusions and next steps	<u>9</u>

Agenda

15:00 - 15:05	Welcome and introduction <ul style="list-style-type: none">• Moderator: Dolores Ordóñez, General Director at AnySolution and Co-Chair of the Digital T4T subgroup
15:05 – 15:35	Session 1 “From Start-up to Scale-up: Lessons from Europe’s Travel Ecosystem” <ul style="list-style-type: none">• Dr. Patrick Andrae, Co-Founder & CEO, HomeToGo• Catriona Meehan, Director of Public Affairs, Omio• Meriam Jawad, Innovation, Travel Tech and Data Project Officer, French Ministry of Economy and Finance• Savvas Rogotis, Co-Founder and Business Development Manager, TRAVEL2FIT
15:35 – 16:05	Session 2 “Empowering Travel tech Innovation: The Role of Ecosystem Enablers” <ul style="list-style-type: none">• Jaume Monserrat, President of TURISTEC• Peter Haxton, DSenior Policy Analyst, Tourism Policy and Analysis Unit, centre for Entrepreneurship, SMEs, Regions and Cities, OECD• Nicola Bianchi, Vice director, EDI.it• Leonardo Saroni, General partner, TravelTech.VC
16:05 – 16:20	Q&A
16:20 – 16:30	Closing remarks <ul style="list-style-type: none">• Wrap up by the moderator Dolores Ordóñez• Maximilian Strotmann, Tourism, DG MOVE• Emmanuel Mounier, Secretary General, EU Travel Tech and Chair of the T4T Digital Subgroup

Speakers

Transition pathway for EU tourism

Moderates:



Dolores Ordoñez
Expert of the T4T Digital Subgroup.
Anysolution



Dr. Patrick Andrae
Co-Founder & CEO,
HomeToGo



Catriona Meehan
Director of Public Affairs,
Omio



Meriam Jawad
Innovation, Travel Tech &
Data Project Officer,
French Ministry of Economy
and Finance



Savvas Rogotis
Co-Founder and Business
Development Manager of
TRAVEL2FIT



Jaume Monserrat
President of TURISTEC



Peter Haxton
Senior Policy Analyst,
Tourism Policy and
Analysis Unit, Centre for
Entrepreneurship, SMEs,
Regions and Cities, OECD



Nicola Bianchi
Vice director, EDI.it



Leonardo Saroni
TravelTech.VC



Maximilian Strotmann
Tourism Unit,
DG MOVE



Emmanuel Mounier,
Chair of the T4T
Digital Subgroup

Webinar in numbers



198 Registrations



95 Participants

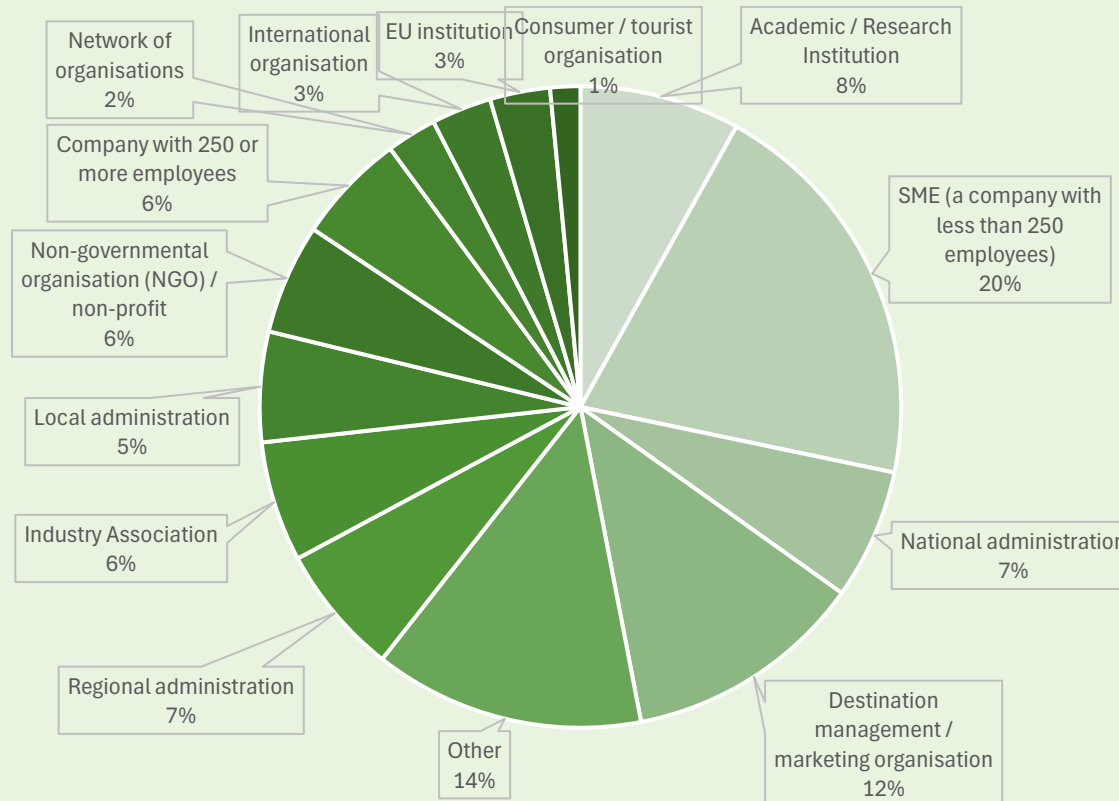


Participants from **20 EU MS** and **13 non-EU countries**



10 Speakers

Participants' Organisations



Results of the post-webinar survey



100% of the respondents were very satisfied/satisfied with the webinar.



100% of the respondents found that the webinar provided useful information.



100% of the respondents feel that they have obtained a better understanding and knowledge of the topic after attending.

Key discussion points (1/3)

Representatives from the, **HomeToGo, Omio, French Ministry of Economy and Finance, Travel2Fit, TURISTEC, OECD, EDI.it, and TravelTech.VC** discussed the following:

1

Session 1: “From Start-up to Scale-up: Lessons from Europe’s Travel Ecosystem”

- Dr. Patrick Andrae from HomeToGo, used the company’s scaling experience to **highlight the structural challenges of this process in travel tech in Europe**. Regulatory and market fragmentation was emphasized as a “fragmentation tax” that places European companies at a disadvantage compared to US competitors, despite Europe being a larger and more travelled market. It was argued that harmonization initiatives such as EU-INC are positive steps but remain insufficient without consistent application across Member States. Access to capital was another point of discussion, with Dr. Andrae considering the relative difficulty of raising growth capital and lack of interoperability of European public markets. He concluded that regulatory predictability and a truly functioning single market are prerequisites for European travel tech companies to scale and compete globally.
- Catriona Meehan from Omio showcased how the company evolved for a Berlin-based startup into a multimodal platform connecting over 3,000 transport providers across 46 countries, using this journey **to illustrate how innovation in travel tech depends on access**. Europe’s already has strong transport infrastructure and high cross-border travel demand, but scaling is constrained by nationally organized transport systems, incompatible technical standards, and fragmented distribution models. It was stressed that innovation is enabled when platforms can connect to transport services on fair, transparent, and workable terms, allowing competition to focus on customer experience rather than market power. Integrated ticketing and multimodal planning were presented as key benefits for travellers, who do not think in terms of national systems. Concluding, better connectivity between operators and platforms was emphasized as benefiting all actors, platforms scale, operators reach new demand, and travellers gain simpler cross-border journeys. Therefore, how fair access and competitive distribution can unlock innovation and deliver better choice for travellers.
- Mariam Jawad from the French Ministry of Economy and Finance **presented the France Tourisme tech programme** as a concrete public policy instrument designed to strengthen Europe’s travel tech ecosystem through structured support rather than isolated funding. The programme selects promising startups using emerging technologies such as AI and supports them through mentoring, open innovation, learning expeditions, visibility, and connections to investors and EU funding programmes. A central objective is to reduce Europe’s reliance on non-European technology providers by fostering domestic and European travel tech champions. Jawad highlighted the ambition to move beyond a national approach by building a network of European incubators and accelerators, encouraging cross-border collaboration. The France Tourisme tech was positioned as both a scale-up mechanism for startups and a bridge between public authorities, large industry players, and innovators.

Key discussion points (2/3)

1

Session 1: “From Start-up to Scale-up: Lessons from Europe’s Travel Ecosystem” (cont.)

- Savvas Rogotis presented **TRAVEL2FIT and its five-year journey from a small enquiry-management tool for hotels to a broader data-driven and AI-enabled platform** serving multiple tourism stakeholders. The shift of traveller behaviour towards a personalized, experiential, and direct engagement style was highlighted to showcase how it created both opportunities, and pressures for tourism professionals. It was also emphasized, that while innovation has accelerated, travel professionals face increasing “noise” from too many disconnected digital tools, making integration and interoperability critical. Access to data, skills development, and the ability to pilot solutions in real environments as key challenges for SMEs. Participation in national and EU innovation programmes was presented as essential for validation, learning, and scaling. Concluding, it was highlighted that successful travel must deliver value across the full booking lifecycle and be embedded within a connected ecosystem rather than operate as standalone solutions.

2

Session 2: “Empowering Travel Tech Innovation: The Role of Ecosystem Enablers”

- Jaume Monserrat from TURISTEC showed **how technology can be used as a Transformative force reshaping tourism at multiple levels** such as customer experience, operations, and governance, rather than a neutral efficiency upgrade. Similarly, ecosystem facilitators such as clusters, accelerators, and innovation hubs play a critical role in translating technological potential into real-world adoption. Pilots with real operators, real data and real constraints were highlighted as the most effective mechanism for accelerating innovation, arguing that pilots are often more valuable than funding alone. Clusters and corporate accelerators were presented as environments for co-development rather than procurement, enabling faster learning and deployment. Metrics such as speed to pilot, adoption at scale, and commercial traction were proposed as the most meaningful indicators of ecosystem success. He concluded that technology only transforms tourism when ecosystems actively reduce barriers between innovation and deployment .
- Peter Haxton from **OECD presented findings from the OECD work mapping tourism incubators and accelerators across Europe** and beyond, highlighting both progress and structural gaps. He noted the growing presence of tourism-specific support programmes but identified fragmentation, uneven geographic distribution, and an over-focus on short-term, early-stage interventions. Scale-up support, long-term transformation, and integration of challenges such as AI adoption, labours shortages, and climate adaptation were found to be underdeveloped. The lack of systemic monitoring and impact and impact assessment was emphasized, which impeded long-term effectiveness evaluation. A case was made for better coordination across policy levels and stronger institutional anchoring of programmes to build trust and continuity. The need for evidence-based policymaking to guide future support for tourism entrepreneurship was a central conclusion.

Key discussion points (3/3)

2

Session 2: “Empowering Travel Tech Innovation: The Role of Ecosystem Enablers” (cont.)

- Nicola Bianchi from EDI.it / EDIHs, presented the **European Digital Innovation Hubs (EDIHs) as a practical mechanism to operationalize digital transformation for tourism SMEs** through experimentation rather than abstract strategy. He emphasized “test before invest” as a core principle, enabling companies to pilot technologies through proofs of concept and feasibility studies before committing resources. Bianchi highlighted language and information asymmetry as major barriers for small tourism businesses, which often struggle to navigate the complexity of digital innovation. EDIHs were described as intermediaries that translate business needs into technological solutions while fostering collaboration between traditional companies and startups. He also stressed the importance of sharing knowledge and best practices across regions through the EDIH network, particularly via the tourism thematic working group. Hence, how innovation hubs support companies through services such as test-before-invest. Technology advisory, training and open innovation initiatives. The next phase of the programme was presented as more focused, with a stronger emphasis on AI and ecosystem integration.
- Leonardo Saroni – from TravelTech.VC focused on **the role of “ecosystem capital” in scaling European travel tech**, arguing that funding alone is insufficient in a fragmented market. He explained that TravelTech.VC combines investment with access to corporate partners, distribution channels, and real operational environments to accelerate validation and reduce market risks. During the presentation, infrastructure-level solutions, operational efficiency, and recurring business models were identified as key characteristics of scalable travel tech. He emphasized that access to costumers, partnerships, and feedback loops is essential for European startups to move beyond domestic success and become continental players. The discussion highlighted how venture capital can act as a connector between startups, industry incumbents, and policymakers. He concluded that Europe needs more ecosystem-driven investment models to build globally competitive travel tech champions.

Conclusions and next steps

-  Operationalise a predictable EU Single Market for travel tech and prevent regulatory fragmentation
-  Travel tech platforms unlock seamless, cross-border travel by connecting fragmented transport systems into a more connected European travel ecosystem
-  Travel tech companies should embed AI and collaborate across Europe to scale through a unified ecosystem..
-  Focus on integration, real-world piloting, and continuous upskilling to help travel professionals cut through platform overload and deliver end-to-end, experience-driven value.
-  Build strong people-led ecosystems, because they, and not technology alone, determine whether transformation actually happens.
-  Anchor tourism incubation in long-term, institutionally supported programs and systematically map the startup landscape to build trust, continuity, and more effective support.
-  EDIHs should prioritise “test-before-invest” experimentation and cross-ecosystem collaboration, with a strong focus on AI, to help SMEs and public organisations translate digitalisation into real competitiveness
-  European travel tech scales only when capital is combined with strong ecosystem access to industry, customers, and distribution, so start ups can validate faster, improve efficiency and scale sustainably

Thank you!

The document has been prepared for the European Commission in the context of the project “Transition Pathway Stakeholder Support Platform: Implementation for Tourism Ecosystem” (the Project) in accordance with the signed contract No EISMEA/2022/OP/0018. This report reflects the views and results of the workshop discussion between the tourism stakeholders and do not necessarily represent the views of the European Commission. The action recommendations, however, do not necessarily represent the position or endorsement of all stakeholder groups nor the position of individual Member States or the European Commission.