

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

*17 March 2026, 15.00 - 16.30 CET*



**Join now the EU Tourism Platform**

<https://transition-pathways.europa.eu/tourism>



European  
Commission

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

## Agenda

15.00 – 15.05	<b>Welcome and Introduction</b>
15.05 – 15.35	<b>Session 1 “From Start-up to Scale-up: Lessons from Europe’s Travel Tech Ecosystem”</b> <ul style="list-style-type: none"><li>• Dr. Patrick Andrae, Co-Founder &amp; CEO, HomeToGo</li><li>• Catriona Meehan, Director of Public Affairs, Omio</li><li>• Meriam Jawad, Innovation, Travel Tech and Data Project Officer, French Ministry of Economy and Finance</li><li>• Savvas Rogotis, Co-Founder and Business Development Manager of TRAVEL2FIT</li></ul>
15.35 – 16.05	<b>Session 2 “Empowering Travel Tech Innovation: The Role of Ecosystem Enablers”</b> <ul style="list-style-type: none"><li>• Jaume Monserrat, President of TURISTEC</li><li>• Peter Haxton, Senior Policy Analyst, Tourism Policy and Analysis Unit, Centre for Entrepreneurship, SMEs, Regions and Cities, OECD</li><li>• Nicola Bianchi, Vice director, EDI.it</li><li>• Leonardo Saroni, TravelTech.VC</li></ul>
16.05 – 16.20	<b>Q&amp;A</b>
16.20 – 16.30	<b>Closing remarks and next steps</b> <ul style="list-style-type: none"><li>• Wrap-up by moderator</li><li>• Maximilian Strotmann, Tourism, DG MOVE</li><li>• Emmanuel Mounier, Chair of the T4T Digital Subgroup</li></ul>

## Transition pathway for EU tourism

Moderates:



**Dolores Ordoñez**  
Co-chair of the T4T  
Digital Subgroup.  
Anysolution

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

Transition pathway  
for EU tourism



**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**  
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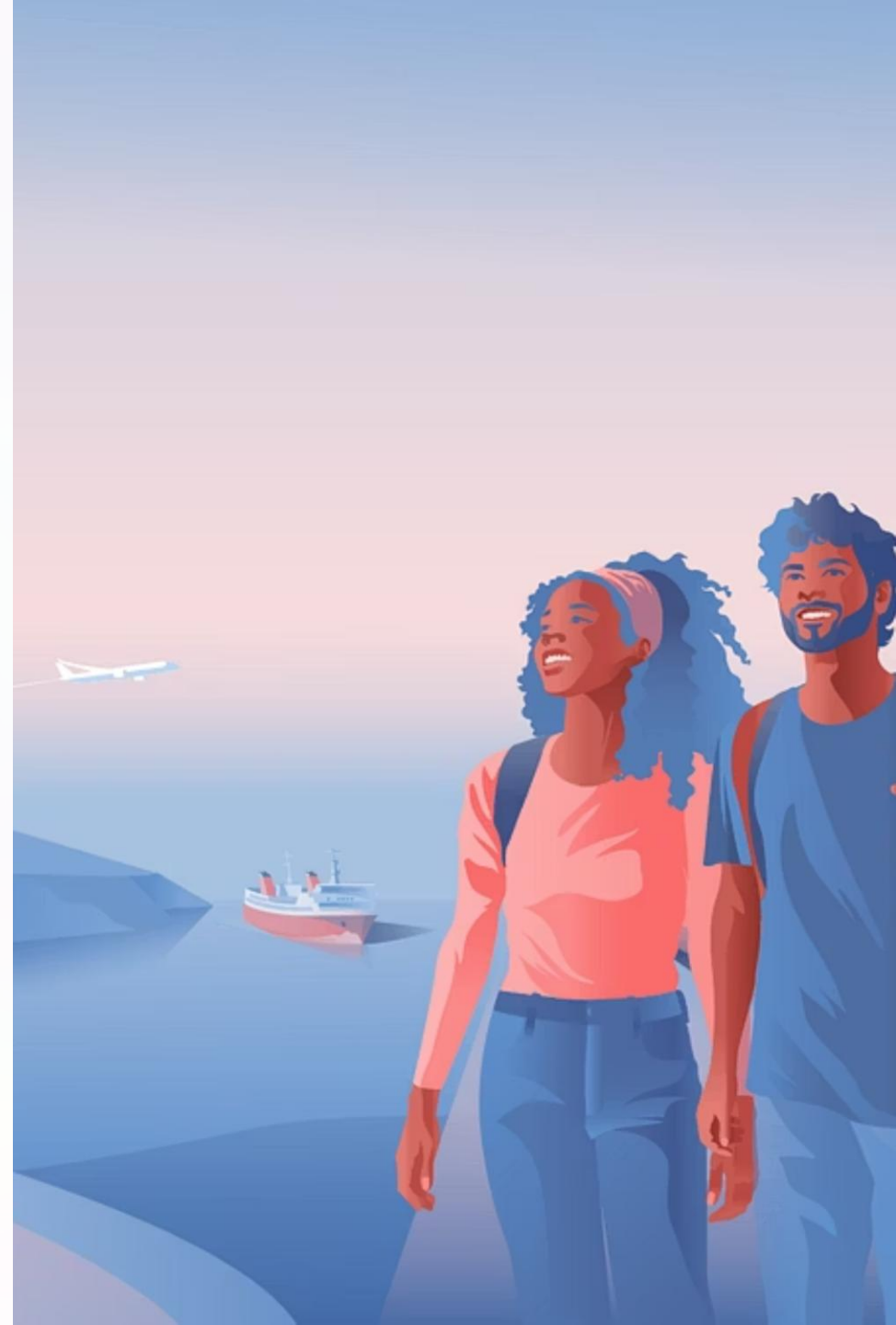


**Catriona Meehan**  
Director of Public Affairs,  
Omio



# Connecting Europe's Travel Market

Omio's journey from startups to multimodal platform



# Building Omio: Key Learnings

From a Berlin start-up comparing trains and buses to a multimodal platform connecting hundreds of transport providers across Europe, revealing what enables travel tech companies to scale.



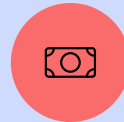
## Multimodal Platform

Rail, coach, flight & ferry  
in one place



## 46+ Countries

Connecting travellers  
across Europe and  
beyond



## 33 Currencies

Localised booking and  
payments across markets



## 32 Languages

Travel search designed for  
international travellers

THE OPPORTUNITY

# Europe's Multimodal Opportunity

Europe has world-class transport infrastructure and growing demand for sustainable travel — creating strong potential for multimodal digital mobility.



## Dense Rail Networks

Strong foundations for multimodal travel



## Sustainability

Greener travel policy and demand.



## Digital Natives

Expecting seamless, app-first travel.



## Cross-Border

Growing appetite for international journeys.



## Cross-Border Travel

A defining feature of European mobility



## Digital Travel Demand

Travellers increasingly expect seamless, app-first journey planning



# The Reality: Fragmentation



Scaling a travel tech company in Europe doesn't happen all at once.

It happens integration by integration, market by market. Connecting transport providers means working across different systems, data standards and commercial models.

That's the reality of building a digital platform across Europe.

## Different Systems

Technical standards vary across operators and countries

## Different Standards

No universal data or ticketing protocols

## Different Commercial Models

Distribution approaches differ market by market

## Market-by-Market Integration

Connecting networks often happens operator by operator

*Scaling travel tech in Europe is not just about building technology, it's about connecting ecosystems.*

KEY LESSON

# What We've Learned: Access Matters

When access to transport services is transparent and workable, companies compete on product, service and customer experience. The goal isn't a single distribution model — but a competitive ecosystem where operators and platforms can connect easily.

Access determines how quickly innovation can scale.

## Transparent Access to Inventory

Platforms connecting where operators choose to distribute

## Fair Commercial Terms

Non-discriminatory distribution that rewards quality and reach

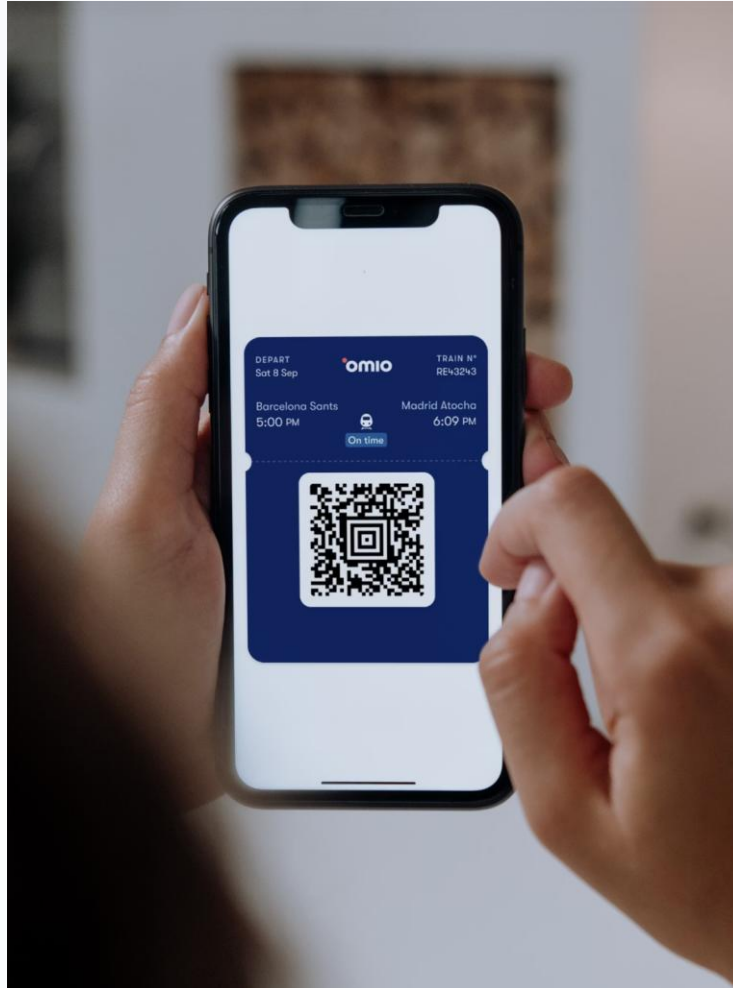
## Competitive Distribution

Expanding operators' digital reach and accelerating innovation

## Level Playing Field

Helping travel tech companies scale and compete across Europe





- **Transparent Comparison**  
Clear pricing across all modes and operators, side by side
- **Multimodal Journeys**  
Train to bus to ferry, connected in a single itinerary

#### TRAVELLER IMPACT

## Why It Matters for Travellers

Travellers don't plan journeys according to national rail systems or distribution structures - they simply want the easiest way to get from one place to another. When markets are connected and competitive, travellers benefit directly.

- **Seamless Cross-Border Booking**  
One experience, regardless of which country the journey crosses
- **Greater Choice**  
Connected markets make it easier to discover and compare journeys



#### OUR SHARED MISSION

# Connecting Europe Is a Shared Project

Europe already has the foundations for a thriving travel tech ecosystem — strong transport networks, growing demand and the technology to connect them.

1

## Infrastructure Exists

World-class rail and transport assets already in place

2

## Demand Exists

Travellers ready for seamless, cross-border digital journeys

3

## Technology Exists

Platforms capable of unifying fragmented supply at scale

4

## Connected Markets Enable Growth

Fair access and competitive distribution help innovation scale across Europe



**Thank you**

Catriona Meehan, Director of Public Affairs, Omio

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



# France Tourisme Tech

# France Tourisme Tech's Key Priorities

## Tackling the Challenges of Tourism Transformation



**Technological Sovereignty** : Reduce reliance on foreign players.



**Innovation** : Harness emerging technologies to enhance the industry.



**Collaboration** : Build a unified ecosystem connecting startups, major corporations, and investors.



**Investment** : Boost fundraising and strengthen financial partnerships.









**Transformation** : Support projects from pilot phase to full-scale deployment.



**Sustainability** : Align innovation with environmental sustainability.

# Eligibility Criteria

-  Headquartered in France ;
-  Start-up/ VSB/ SME wishing to operate or operating in one of the **tourism market segments** ;
-  Integrating **emerging technology** (such as AI, VR, AR,...) , **digital** or **innovative hardware solutions**;
-  **Having a validated technological or hardware system**, demonstrated through tests and prototypes;
-  **Independent company** with no more than 25% ownership by a group;
-  **Annual turnover below or equal to 40 M€** in 2024 ;

# Tailored support



# Learning Expeditions



## Selection of Location/Date for the Immersion

1

**Choice of location** : Either at the company headquarters or at a site emblematic of the core activities of the host



## Targeted Presentations

2

Presentation of the **innovation strategy** for a major corporation or **investment thesis** for a fund

3

**Overview of business units and use cases** within a major



## Networking

4

**B2B meetings** between award-winning start-ups and the corporation's business teams



## Examples of Learning Expeditions

Belambra  
clubs & hôtels

SNCF  
CONNECT  
& TECH

  
 GROUPE ADP

VINCI  
AIRPORTS

  
 CHÂTEAU DE VERSAILLES

daphni

  
 UNIBAIL  
RODAMCO  
WESTFIELD

franprix

# Examples of Learning Expeditions



**SNCF  
CONNECT  
& TECH**



**CHÂTEAU DE VERSAILLES**

2<sup>nd</sup> Cohort

  
**SKÅPING**  
IMMERSIVE LIVECAM

  
 Les  
**flâneuses**

  
**peek'in**  
La fidélisation client par l'objet retrouvé

  
 Affluences

  
**ASK MONA**

  
**Fairjungle**

  
**Fairlyne**

  
**AQUATECH**  
 INNOVATION  
Collecter, assainir, recycler, régénérer notre ressource en Eau

  
**Fullsoon**



1st Cohort

  
**Click&Boat**

  
**tictactrip**

  
**nannybag**

  
**alltheway**

  
**mobee**  
travel

  
**GreenGo**

  
**HostnFly**

  
**wemap**

  
**clorofil**

  
**cozy  
cozy**

  
**ctoutvert**  
.com

  
**Luniwave**

  
**M**  
MURMURATION

  
**outstight**

  
**Wintics**

Award-winning start-ups

**3rd Cohort**



*Smart infrastructure monitoring using metrology, 3D modeling, and AI*



*Hardware and software solutions for energy management in hotels*



*Tools that improve the economic and environmental performance of hotels and restaurants*



*Platform that simplify the recruitment of seasonal workers*



**OOrion**  
*AI technologies that make venues more accessible for people with visual impairments*



*Platform specializing in the rental of private lakes*



*Solutions that secure the management of lost-and-found items*



*An environmental digital-twin solution for tourism stakeholders*



*A mobile app that helps users find a Safe Place and receive assistance in cases of gender-based or sexual violence*



*Tools that optimize the online presence of tourism professionals*

# France Tourisme Tech's laureates

Food service industry



Sustainable tourism/  
flow management

UrbanThinkPlatform



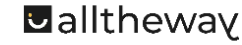
Accommodation



Mapping



Luggage and lost & found management



Business tourism/events



Accessibility



Cultural

ASK MONA

Marketing



Transportation



Training





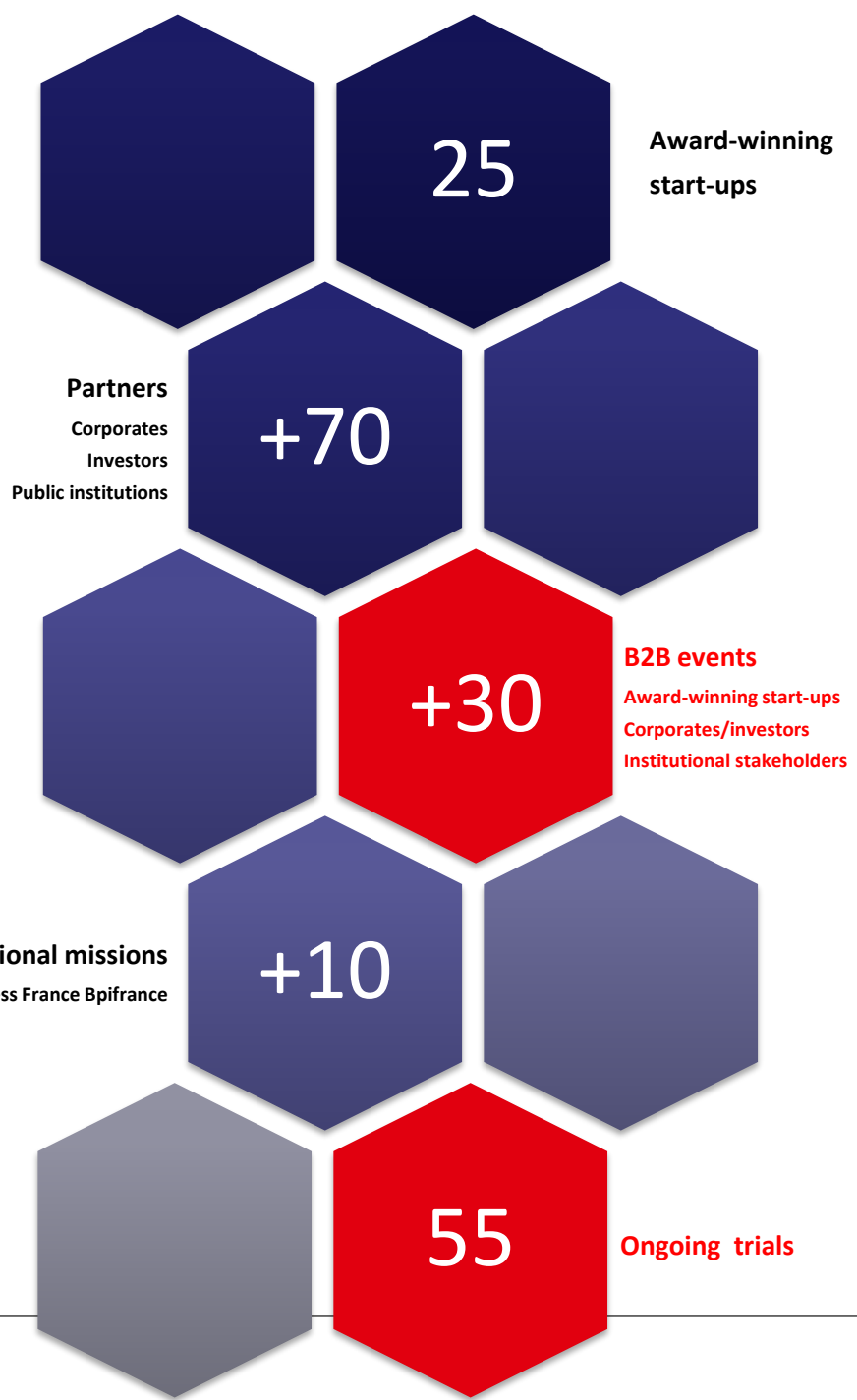
MINISTÈRE  
DE L'ÉCONOMIE,  
DES FINANCES  
ET DE LA SOUVERAINETÉ  
INDUSTRIELLE ET NUMÉRIQUE

Liberté  
Égalité  
Fraternité

# Partners



# Highlights from the first two editions:



## Example of collaboration



**Ask Mona and Versailles  
Palace present an  
immersive experience.**  
Starting in spring 2025,  
visitors can engage in real-  
time conversations with  
twenty fountains and  
statues throughout the  
gardens.

**ASK MONA**

## Conclusion : *Manifesto for a European Travel Tech*



**Build a network of national incubators and accelerators**

1

**Develop a dedicated European support program for scaling, implement regulatory sandboxes for safe testing,...**



**Foster public-private and R&D partnerships**

2

**Fostering public-private partnerships to co-create solutions**

3

**Boosting R&D synergies between research networks, touristic destinations and enterprises**



**Upskill the workforce with emerging technologies for tourism**

4

**In association with the creation of a tourism academy at the EU level: AI, cybersecurity, cloud, data analysis, service design,...**



**Support travel tech dedicated investments**

5

**Highlight success stories and encourage exchanges between investors and governments, in order to remove obstacles to investment.**

**Thank you!  
Any Questions ?**

# Eligibility Criteria

The selection will be carried out by a panel of tourism expert, representing all tourism vertical, based on the following criteria:

- **Social & CSR Impact** (gender balance, diversity, accessibility, number of jobs created by the solution)
- **Economic Viability** (size of the potential market, international potential, number of users for B2C solutions)
- **Innovative Nature:** Originality of the trend or technology proposed (link to research and development)
- **Leadership Team Expertise**
- **Plausible collaboration** with the program's partners

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**Savvas Rogotis**  
Co-Founder and Business  
Development Manager of  
TRAVEL2FIT



# Travel2Fit

Transforming Travel Businesses &  
Destinations with Smart Digital  
Solutions

## TRAVEL2FIT's 5-year journey From a niche enquiry management platform for hotels to data-driven travel intelligence and R&I collaboration

Webinar «Innovate, Scale, Compete: Europe's Travel Tech Momentum»

17.03.2026



**Savvas Rogotis**

**Co-founder & Business Manager**



# It all started in 2021...



- **Shift in travel behavior** & requests for experiential, independent travel - beyond one-fits-all approaches
- **Demand for personalization** with travelers expecting direct, tailored engagement rather than generic offerings



Hoteliers  
Property Managers

Motives to go offline – over-reliance on **OTAs** leading to unbalanced sales mix & profit-squeezing **commissions**

Travel Advisors  
Tour Operators



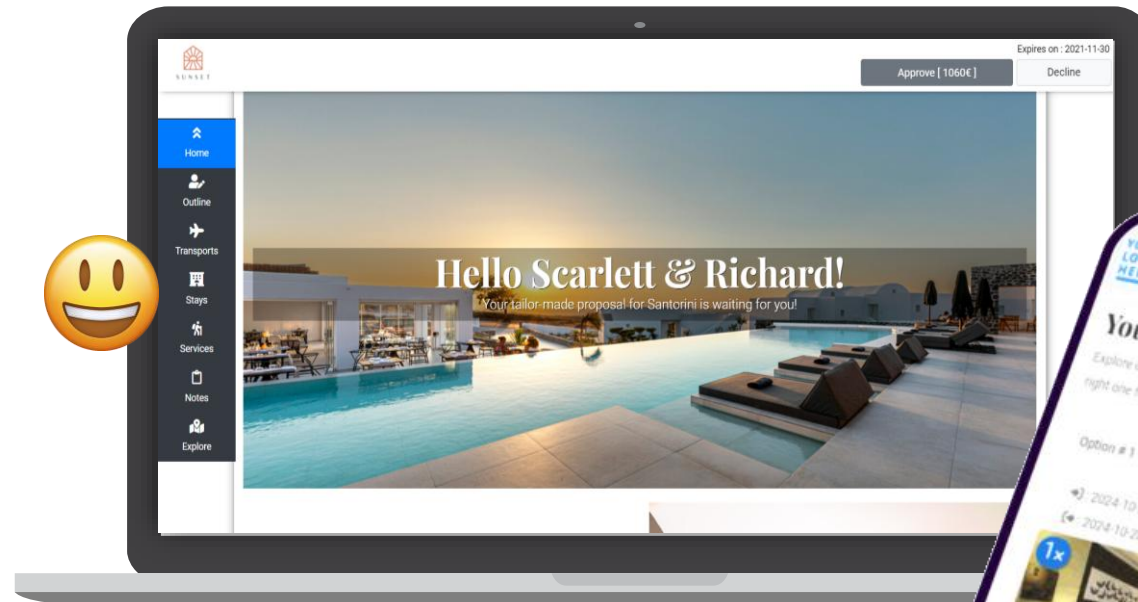
Lacking tools for effectively respond to direct enquiries – still using **(static emails, pdfs, fragmented operations)**

# Travel2Fit's Etheria platform

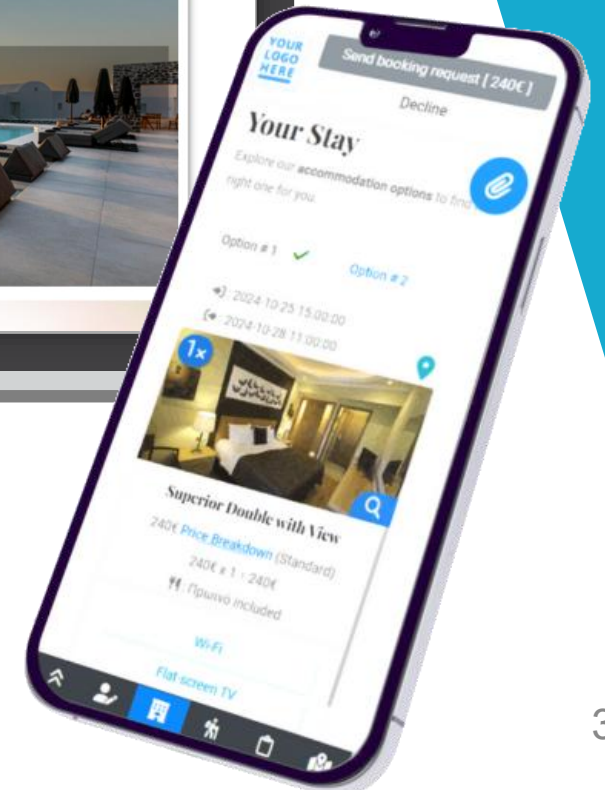
An Enquiry management platform for modern travel professionals –  
From the direct guest enquiry to a personalized e-Proposal and a confirmed booking



Stop sending boring emails to respond to direct booking enquiries...



Start sending winning e-Proposals



# The journey so far



2021

Legal establishment

Incubators & communities



First clients & achievements



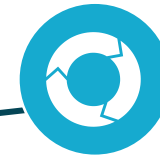
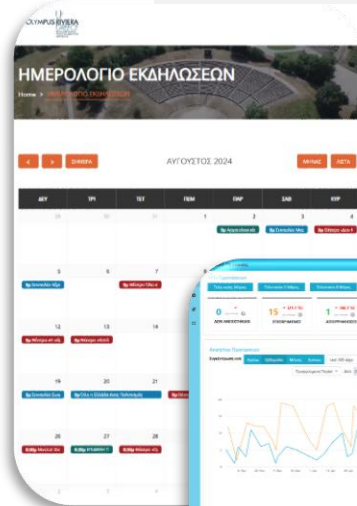
Top 10 brightest startups for 2022 in data-driven technologies



2023

New audiences

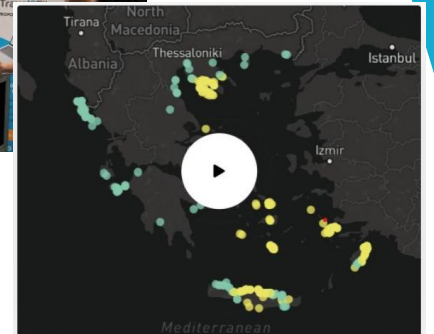
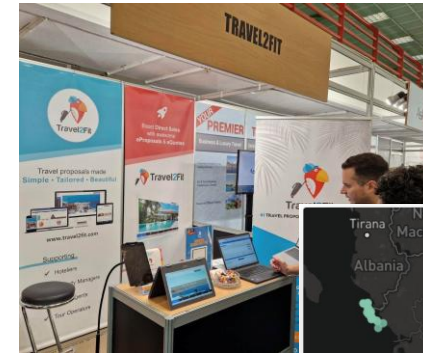
New clients & products - Smart Solutions for DMOs



2025

Innovating & Scaling

Visibility – Focus – Partnerships – Team development



Innovative

Connected

Resilient

Data-driven

Our vision towards the future



Travel2Fit pursues its participation in collaborative  
Research & Innovation projects

### ERASMUS+ / SKILLS DEVELOPMENT



Digital, Green, and  
Innovative VET training to  
travel professionals

Closed

[dgi-tourism.eu/](http://dgi-tourism.eu/)



VET training for  
trustworthy and **ethical**  
use of **AI** in tourism

Closed

[ethaitour.eu](http://ethaitour.eu)



VET training for the  
adaptation to digital  
transformations and  
increasing risks related to  
cybersecurity in tourism

Ongoing

[treadsproject.eu](http://treadsproject.eu)

### OPEN CALLS / TECH DEVELOPMENT



AI-based  
Revenue Optimizing  
System with Dynamic  
Forecasting for  
Accommodation SMEs

H2020 (OC2) - Closed

[reach-  
incubator.eu/startups/  
travel2fit/](http://reach-incubator.eu/startups/travel2fit/)



Digitization and  
sustainability in the  
**Blue Economy**,  
focusing on the  
adoption of **Advanced  
Digital Technologies**  
(including AI)

INTERREG (OC2) -  
Ongoing

[adt4blue.eu/](http://adt4blue.eu/)



A Smart Digital Hub  
for **Rural Tourism**  
Promotion with  
Interactive Map,  
Community  
Engagement, and **AI**  
Itineraries

HE (OC1) - Ongoing

[smartera-project.eu/](http://smartera-project.eu/)



# Lessons-learnt

## Connected to the travel-tech ecosystem

- The landscape & competitions evolves rapidly – especially with the introduction of AI
- A proliferation of tools creates significant noise for travel professionals
- Synergies in the form of integrations and data sharing are essential to deliver value – but this remains highly challenging

## Connected to incubators/acceleration programmes

- Networking and mentoring really important at first stages
- Testing / piloting activities at real-world environments are crucial for building confidence and validating assumptions connected to product-market fit

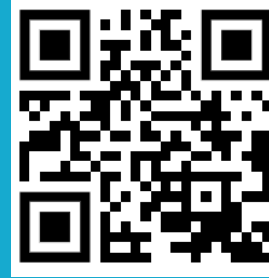
## Connected to travel professionals

- Success depends on differentiation, adaptability to travel trends and always offering value (throughout all phases – pre-booking, after-booking, ...)
- Travelers have stopped buying “just rooms” they are buying complete destination experiences
- Skills development – digital / green but also connected to crises management very relevant



# Travel2Fit

Transforming Travel Businesses &  
Destinations with Smart Digital  
Solutions



Scan and  
visit our **website**



Scan and  
visit our **LinkedIn** account

Thank you!

[srogotis@travel2fit.com](mailto:srogotis@travel2fit.com)

 [travel2fit.com](https://travel2fit.com)

 [hello@travel2fit.com](mailto:hello@travel2fit.com)

 +30 210 220 0370

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

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

Transition pathway  
for EU tourism



**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**  
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turistec

Ecosystem Facilitators as Engines  
of Digital Transformation

# Technology as a Transformative Force in Tourism



# Technology Is Reshaping Tourism At Every Level



*The transformation is structural, not incremental*

**73%**

of travellers use digital tools  
throughout their entire  
journey

**\$1.2T**

in global travel tech  
investment  
forecast by 2030

**40%**

reduction in operational  
costs  
via AI-driven automation

**3x**

faster growth for digitally  
mature tourism operators

**Customer layer:**

Discovery · Booking · Experience · Loyalty

**Operations layer:**

Revenue management · Logistics · Sustainability reporting

**Ecosystem layer:**

Distribution · Connectivity · Open data · Regulation

# Why Travel Tech? Four Forces of Change

Today's traveller decides, books, and shares — entirely in digital environments

CONTEXT

**2,500+**

Travel Tech startups  
across Europe

Driving €multi-billion transformation  
across the EU tourism economy

## Operational efficiency

*Automation, AI, real-time data*

## Hyper-personalisation

*Behavioural data, dynamic pricing*

## Sustainable transformation

*Carbon tracking, green tech*

## Regulatory evolution

*Digital ID, data sovereignty, NIS2*

# Ecosystem Facilitators: Accelerating Digital Transformation



## DEFINITION

*"Organisations that reduce barriers and accelerate startup growth by connecting talent, market access, capital, and validation — making technology adoption faster and more systemic."*

### Incubators

Early stage: space and mentorship

### Accelerators

Rapid growth with investment

### Clusters

Public-private sectoral networks

### Hubs & Corporates

Corporate challenges and pilots

### Public Programmes

Funding and regulatory sandboxes

### Investors

Seed and follow-on capital

# 4 Ways Facilitators Drive Technological Transformation



1

**Mentorship  
& Training**

Business skills + deep  
tourism sector knowledge +  
regulatory guidance

2

**Funding  
Access**

Connections to investors,  
seed rounds, and follow-on  
funds

3

**Pilots &  
Validation**

Testing in real  
environments: airlines,  
hotels, destinations

4

**Network &  
Internationalisation**

Partners, distribution  
channels, and multi-country  
expansion

*"Pilots and networks are often worth as much as funding — they compress the technology adoption cycle."*

# European Examples – Technology Transformation in Practice



## CASE STUDIES

### ES Turistec

Balearic Islands, Spain · Public-Private Cluster

Connects tourism companies, technology providers, and startups to co-develop digital solutions and drive shared technological adoption across the destination.

### GB Hangar 51

IAG, United Kingdom · Corporate Accelerator

Embeds startups within one of Europe's largest airline groups — delivering intensive mentorship and direct access to live pilot programmes that accelerate real-world deployment.

### FR Welcome City Lab

Paris, France · Urban Incubator

Bridges municipal data, local partner networks, and tourism-focused startups to prototype and scale digital solutions addressing genuine destination management challenges.

# Measuring the Impact of Digital Transformation



## MEASUREMENT

### Speed

- Time to first pilot
- Time to first commercial contract

### Traction

- % of startups generating revenue
- User or transaction growth rate

### Capital

- Investment raised by stage
- Public-private co-investment ratio

### Adoption

- Active pilots with corporates
- Technologies deployed at scale
- Expansion to new markets

*"Training without adoption does not transform the sector. The metric that matters is technology reaching real operations."*

# 3 Practical Recommendations to Accelerate Transformation



ACTION

01

IF YOU ARE A STARTUP

## Prioritise facilitators with pilot access

Look beyond training programmes: seek ecosystems that connect you with real companies, live data environments, and early contracts.

02

IF YOU ARE A TOURISM COMPANY

## Build a repeatable digital innovation pipeline

Challenge → Selection → Pilot → Scale. Partner with a hub or accelerator to systematise and accelerate technology adoption.

03

IF YOU ARE A PUBLIC AUTHORITY OR DESTINATION

## Enable the infrastructure for transformation

Open data, regulatory sandboxes, and innovation-friendly procurement are the levers that unlock system-wide digital change.

## Technology does not transform tourism. People and ecosystems do.

---

Fewer barriers.

More experimentation.

Faster adoption.

Systemic change.

### Your action in the next 30 days

- 1 Identify 1 relevant facilitator (cluster, hub, or accelerator)  
.
- 2 Define a concrete pilot aligned with your key digital challenge  
.
- 3 Reach out and activate the collaboration  
.

#### Discussion prompt:

Which digital challenge in your organisation would be the strongest candidate for a pilot?

THANK YOU



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



# SUPPORTING TOURISM ENTREPRENEURSHIP, START-UPS AND EARLY-STAGE BUSINESS VENTURES

Innovate, Scale, Compete: Europe's Travel Tech Momentum  
17 March 2026

Peter Haxton, Senior Policy Analyst, Tourism Policy and Analysis Unit, OECD

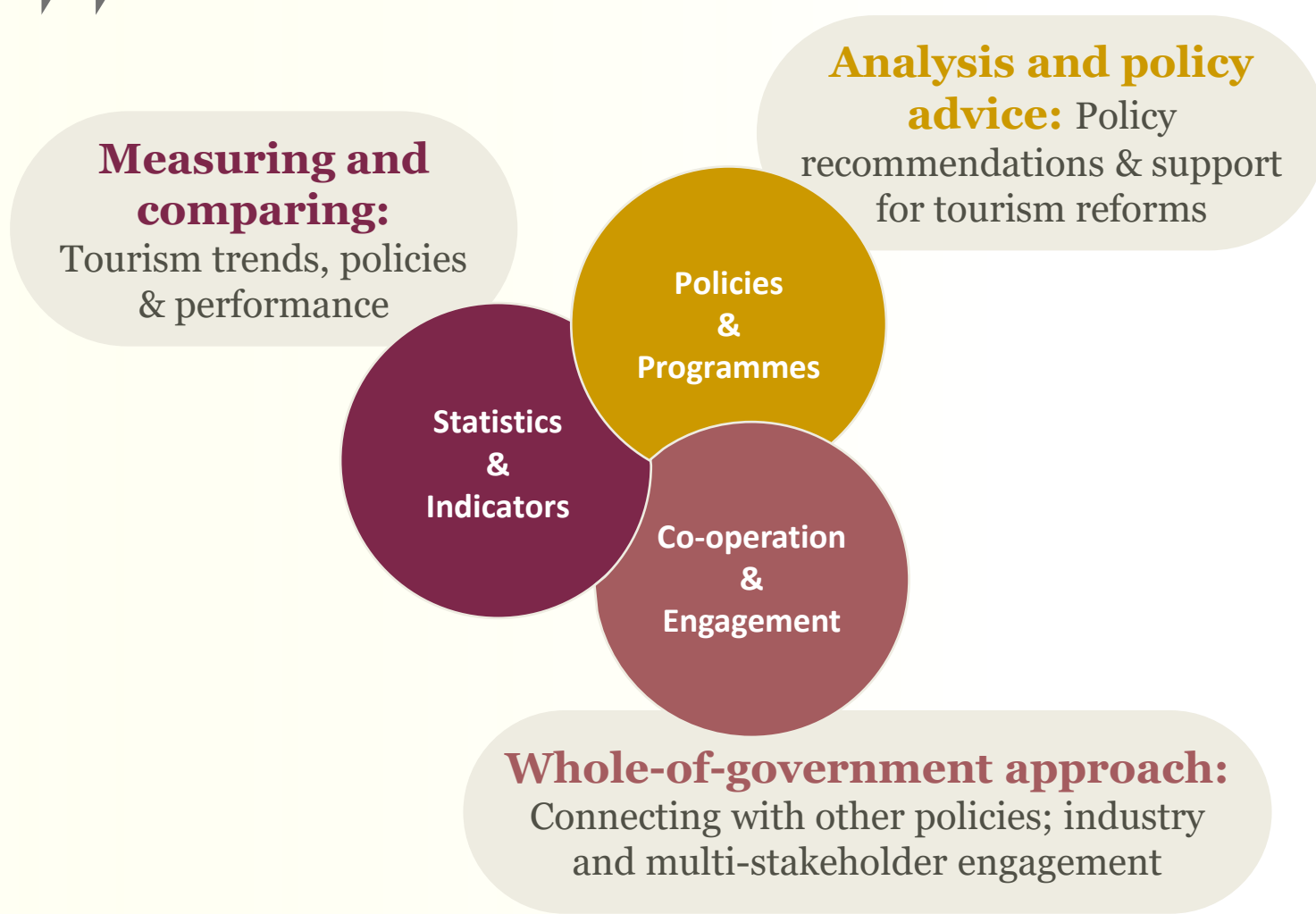
 @OECD\_local

 [www.linkedin.com/company/oecd-local](https://www.linkedin.com/company/oecd-local)

 [www.oecd.org/cfe](https://www.oecd.org/cfe)



# OECD's integrated approach to tourism



## TOURISM COMMITTEE PRIORITIES 2025-26

-  **TRENDS & POLICIES**  
Flagship publication OECD Tourism Trends and Policies 2026
-  **DATA & EVIDENCE**  
Strengthening tourism statistics and indicators, using alternative data sources and tools, tourism database
-  **SUSTAINABILITY**  
Optimising social impacts of tourism, tourism governance, planning and management
-  **RESILIENCE, TRANSITION**  
Digitalisation and AI adoption, adapting to weather-related events



# Innovation is key to set tourism on a more sustainable, resilient and competitive path

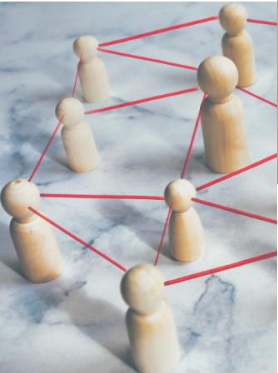
- ❖ Build **strong destinations** equipped to adapt in times of change
- ❖ Better manage tourism to unlock the economic potential, reduce environmental impacts and ensure **benefits reach local communities**
- ❖ Support **SMEs through the business lifecycle** to enhance service offerings and promote sustainable business practices
- ❖ Seize the potential for AI and other **emerging technologies**
- ❖ Develop the **capacity and infrastructure** tourism needs to flourish, as part of a diversified economy

# Incubators and accelerators are tools to promote entrepreneurship, start-ups and scale-ups

The appropriateness of the incubation and acceleration system to the needs of start-ups and scale-ups in Portugal

Supporting start-up globalisation in Ireland through incubation and acceleration

Final Report - C



Policy Brief on Incubators and Accelerators that Support Inclusive Entrepreneurship

- ❖ Strategic importance of start-ups to drive innovation and competitiveness
- ❖ But barriers to start-up and scale (access to finance, skills shortages, regulatory fragmentation, exposure to shocks etc.)

?

What supports do travel and tourism start-ups need to encourage their innovation capabilities?

What role for incubators and accelerators?



# Building evidence on use of incubators and accelerators in tourism

- ❖ Elaborate on the **role of start-ups** in tourism and policymaking
- ❖ Identify the **potential** of incubation and acceleration
- ❖ **Identify** incubators and accelerators dedicated to supporting business creation and the early-stage businesses in the tourism sector
- ❖ **Collect** good practices and success stories from EU and OECD countries
- ❖ **Map and analyse** key characteristics of the programmes



# Findings from mapping exercise

- ❖ A **growing presence** of tourism-specific incubators and accelerators
- ❖ Accelerators play an important role in **connecting tourism start-ups** across borders and promoting co-operation
- ❖ Emphasis on **early entrepreneurial stages**, reflecting policy efforts to stimulate new business creation and innovation
- ❖ Accelerators of **three to six months duration** dominate tourism innovation support
- ❖ A **diverse mix of facilities and services** on offer



# A fragmented and uneven landscape

- ❖ Short-term early-stage interventions with **few initiatives supporting** scale-up, SME transformation or long-term restructuring
- ❖ Key tourism challenges (e.g., labour shortages, climate adaptation, data and AI uptake) are **not yet systematically integrated into incubation** agendas
- ❖ The **strong dependence on public programmes** makes the landscape sensitive to funding cycles and project-based discontinuities
- ❖ **Monitoring** and **impact assessment** remain largely underexplored – how to evaluate **long-term effectiveness of incubation** and **acceleration**

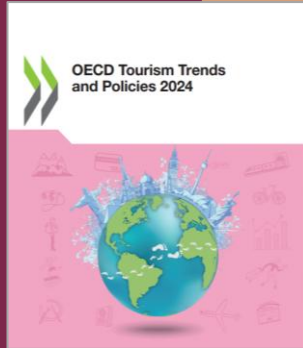


# Towards a more coherent and impactful tourism incubation and acceleration ecosystem

- Strengthening strategic integration and initiating co-operation in the wider policy mix
- Promote linking and co-ordination of programmes across geographical levels
- Increase visibility and communication of available programmes across the start-up lifecycle
- Establish long-term or cohort-based programmes
- Capture and understand the start-up landscape



# Find out more – [oecd.org/en/topics/tourism/](https://oecd.org/en/topics/tourism/)



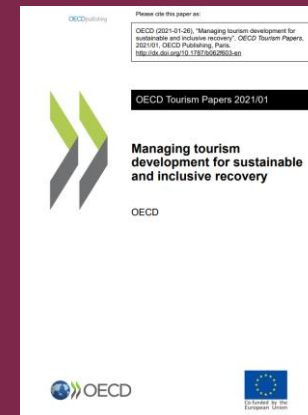
OECD Tourism  
Trends and Policies  
2024



Measuring and  
Monitoring the  
Sustainability of  
Tourism at Regional  
Level in Spain



G7/OECD Policy  
Paper on Artificial  
Intelligence and  
Tourism



Managing tourism  
development for  
sustainable and  
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# Webinar “Innovate, Scale, Compete: Europe’s Travel Tech Momentum”

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

Transition pathway  
for EU tourism



**Nicola Bianchi**  
Vice director, EDI.it

# EDIHs: a European opportunity for tourism SMEs and PSO

NICOLA BIANCHI - EDI Confcommercio

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# Three forces

**EXPERIMENTATION**

**CONTAMINATION**

**SHARING**

# EDIH Network

## European Digital Innovation Hubs (EDIHs)

- **One-stop shops** supporting businesses and public sector organizations
- **Help tackle digital challenges** and boost competitiveness

EDIH services aim to:

- Improve processes, products, and services
- Leverage digital technologies for innovation



# EDIH Network

## The network in numbers

169

EDIHs

76

Seal of  
Excellence EDIHs

30

countries

15

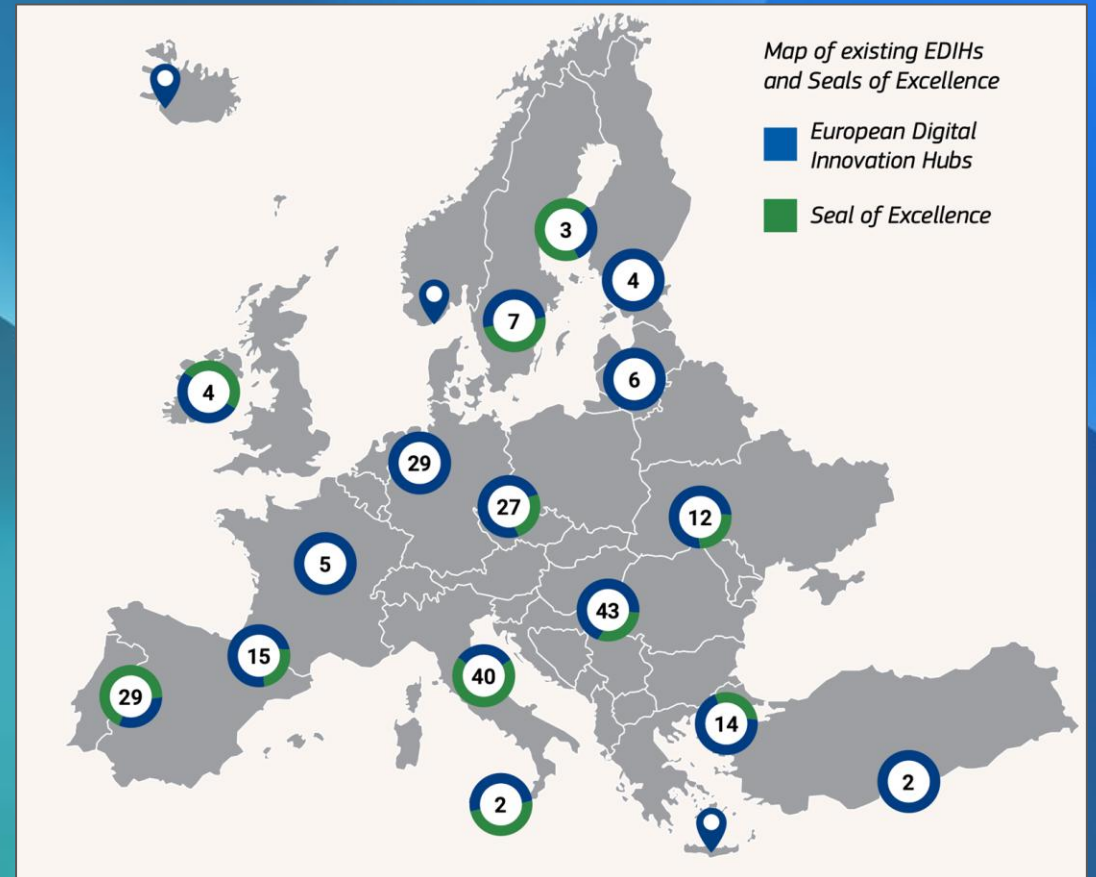
categories  
of services

36

sectors

30

types of  
technologies



# EDIH Network offers a Wide range of services Delivered by hundreds of partners across Europe Structured to support a pathway to guide digital transformation

**Training and Skills Development:**  
Workshops, seminars, and training sessions

**Test Before Invest:** Access to technical infrastructure and expertise to test before acquiring

**Networking and Ecosystem Building:**  
connecting organizations with partners across Europe

**Diagnosis: Assessment and Audit**

**Support To find investment: Assistance in finding funding**

# People behind services

## Training and Skills Development

Anna learned how to integrate AI to support marketing activities of a local DMO

## Networking and Ecosystem Building

Marco had the chance to finally find the perfect startup for his small BnB

## Assessment and Audit

Rita identified the most critical technological gaps in her Countryside Hostel

## Test Before Invest

Paolo had the chance to test a AI consumption monitoring system to reduce energy costs

## Support To find investment

Through a specific advisory Chiara improved her Travel Agency Credit rating to easily receive a Bank loan

# Relevance of networking - Thematic Working Group Tourism



The Tourism TWG had the following **main goals**:

**Sharing best practices and use cases** related to EDIH activities (TBI, Skills and Training, E&N, SFI) and other initiatives  
**Promote synergies** with other initiatives at European level



The twg is a permanent network among participants, based on:

**Meetings** on specific verticals  
**Workshops** to share *use cases and best practices*

# TWG Tourism - Calendar

April, 18 - 2024

**Kick-off meeting**

July, 11 - 2024

**Artificial Intelligence &  
Robotics - WEBINAR**

November, 26/27 - 2024

**Workshop EDIH Annual  
Summit**

September, - 16 2025

**Call 4 input - European  
strategy**

# WHAT'S NEXT: EDIH 2.0

- 1) **Rationalization (e.g. Italy From 40 to 10 hubs for greater efficiency)**
- 1) **Enhanced AI Services and Skills**  
Advanced toolbox and development of strategic AI capabilities
- 2) **Develop AI Collaboration and Platforms**  
On-demand platform, AI Skills Academy, AI Factories, Regulatory Sandboxes, TEFs.

The 2026-29 program aim to the Consolidation and growth of the European AI and digital ecosystem.



Q&A

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

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

Transition pathway  
for EU tourism



**Leonardo Saroni**  
TravelTech.VC



# Scaling European Travel Tech: The Role of Ecosystem Capital

How connected capital can accelerate validation, go-to-market, co-investment, and scale across Europe

Session 2 – Webinar March 17, 2026 | Leonardo Saroni, General Partner

# Why European Travel Tech is Entering a New Scaling Phase

Budget and urgency are shifting from customer acquisition to workflow automation and margin resilience

1. **Margin pressure + labour constraints** are driving adoption of software that delivers measurable operational leverage
2. Travel is shifting from 'distribution-first' to '**operations-first**': automation and cost control are now board-level priorities
3. **Fragmented legacy systems** create demand for connectivity layers and workflow platforms
4. **AI is an accelerant**: sustainable winners combine AI with deep integrations and repeatable enterprise deployment

It's no longer just about innovation; it's about scaling solutions that address structural inefficiencies for travel and hospitality operators.

# What Actually Scales in European Travel Tech

What scales is not just innovation, but solutions that become essential to how travel businesses operate.

**Companies that scale are those:**

- Embedded in critical workflows
- Delivering measurable efficiency
- Generating recurring value

## INFRASTRUCTURE

**Connectivity & interoperability**  
across fragmented systems

**Integration depth** driving switching costs

## EFFICIENCY

**Workflow automation**  
and enterprise productivity

**Operational scalability**  
with measurable cost impact

## RECURRING RESILIENCE

**Predictable SaaS revenue**  
with retention-led durability

**Cycle resilience**  
through recurring value delivery

At TT2 we look for companies that do not grow simply by riding a trend, but by embedding themselves into workflows, integrating into systems, and becoming hard to replace.

# What we mean by ecosystem capital

Combining funding with operator expertise, corporate access, distribution channels, co-investment networks, and strategic market validation.

Operator Expertise

Corporate Access

Distribution Channels

Co-Investors Network

Strategic Validation

## Corporates



Volcano Teide



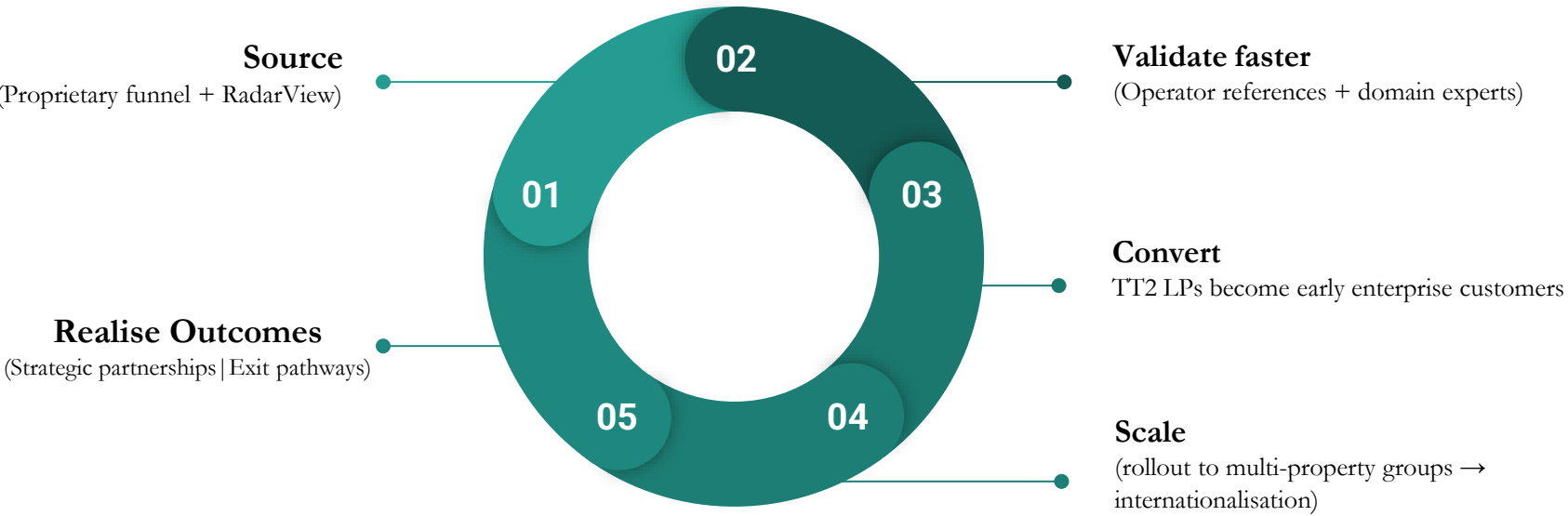
## Related companies to CXO investors

- GOOGLE
- RADISSON
- W2M
- ADOBE
- AMADEUS
- CAPGEMINI
- SPOTIFY
- VECI
- JUMBO
- DELOITTE
- NETACTICA
- ASTICAN
- MIRAI
- GONEXUS
- 22GRADOS
- BELVERA
- ELEVATE
- BESTDAY
- BEDSONLINE
- AFFIDEA

# How Ecosystem Capital accelerates scale

A connected ecosystem creates a compounding effect: faster validation, stronger go-to-market execution, reduced risk, and clearer pathways to scale.

## Illustrative Example



**TT2 unlocks an execution-ready SOM ~33x larger than current clients and revenue**

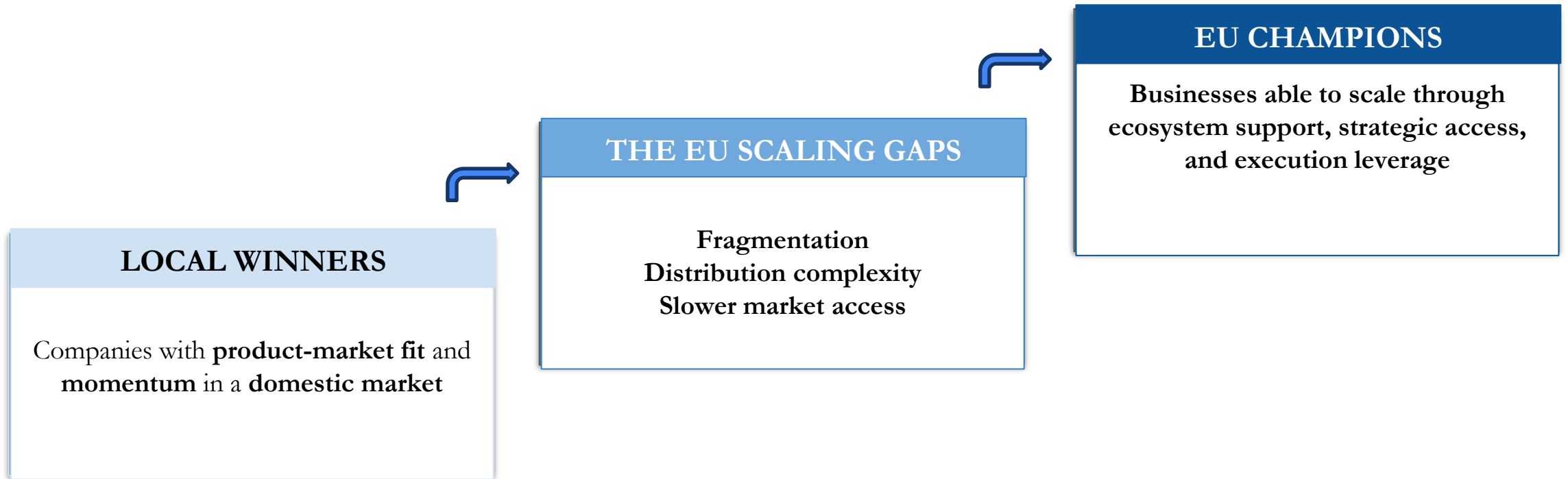
**Today (Proof of Adoption):**  
500+ Hotels | 15,000 Rooms

**TT2 Eco-System Boost (Acceleration Capacity)**  
~3,800 properties (LP hotel groups)  
500,000+ rooms (LP footprint)  
**+Advisory Board reach: Accor, NH, Iberostar, Meliá**

**Net effect → Faster rollout + shorter sales cycles  
→ Higher-conviction underwriting + return potential**

# From Local Winners to European Champions

The opportunity in Europe is not only to fund innovation, but to help high-potential companies scale across markets, customers, and strategic networks.



That is where ecosystem capital becomes decisive: it connects funding with market access, strategic validation, and execution support, helping strong companies scale beyond their home market and become European champions.

Thank you



**TRAVELTECH.VC**

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



**Transition pathway  
for EU tourism**

**Q&A**



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

## Closing remarks and next steps

## Transition pathway for EU tourism



**Maximilian Strotmann**  
Tourism Unit,  
DG MOVE



**Emmanuel Mounier**  
Secretary General, EU  
Travel Tech and  
Chair of the T4T Digital  
Subgroup



**Share your opinion via this survey**



Thank you for your attention!



**Join now the EU Tourism Platform**

<https://transition-pathways.europa.eu/tourism>

