

# EU tourism agenda and transition pathway: implementing sustainability together



Webinar “How EMAS can support improving the sustainability of the tourism sector”

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Ramune Genzbigelyte Venturi  
Tourism Policy Officer  
Tourism and textiles Unit, DG GROW



## EU Tourism in figures

- ❖ **3.5 mln. enterprises, 99% - micro and SMEs**
- ❖ **6,6% of EU Gross Value Added** (10% Croatia, Malta, Greece)
- ❖ Over **20,4 mln. jobs** in 2022 (9,5% of total EU employment)
- ❖ COVID-19 impact: 70% income lost (500mln EUR/day), 1 mln. jobs at risk (2020)
- ❖ **2.9 billion nights spent in the EU**, of which 56% domestic visitors (2023)
- ❖ **60% of EU nights spent in the top-4 countries:** Spain, France, Germany, Italy (2023)
- ❖ **12% of EU nights spent in top-4 regions:** Canarias, Ile de France, Cataluña, and Adriatic Croatia (= total Austria, Portugal, the Netherlands)
- ❖ **Europe received 40% of all international arrivals in 2023** - remains most visited, unique destination in the world



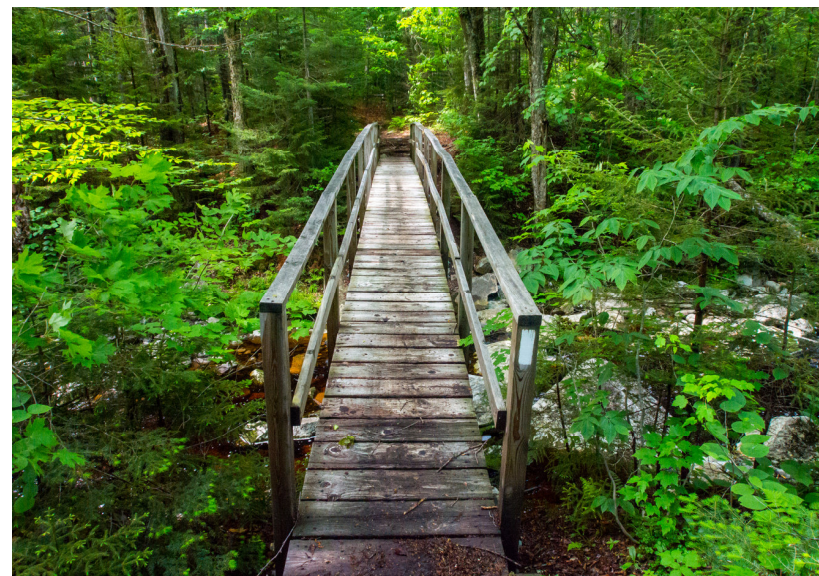


## What are the challenges and opportunities for European tourism?

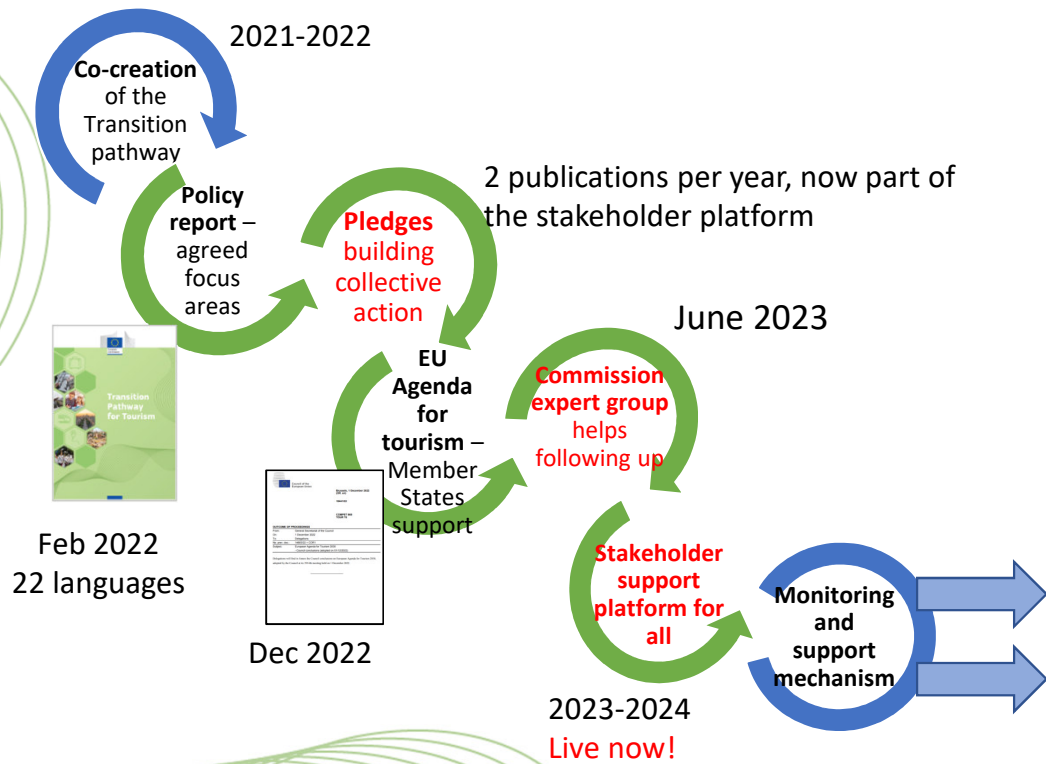
- ❖ **Long-term competitiveness and resilience:** balanced growth, diversification of products and services, adequate skills and staff shortages, adapting to fast changing reality, crisis preparedness and management...
- ❖ **Environment and climate change:** mitigate, regenerate, adapt
- ❖ **Tourism businesses fit for digital age,** including AI
- ❖ **Data** availability, interoperability and application
- ❖ Applying **innovative solutions, research and technology**
- ❖ **Governance:** integrated strategies, cooperation with other sectors, engaging host communities

# Green transition: key challenges and opportunities

- **How to make sustainability a competitive advantage?**
- How to ensure a **balanced growth** across territories and seasons?
- **Contribute to EU climate action**, reducing impacts on environment (CO2 emissions, circularity actions, protecting biodiversity)
- **Adaptation to climate change impacts** (extreme weather conditions, coastal erosion, lack snow, changing tourist flows, preparedness and resilience mechanism)
- **Empowering long-term sustainability** with appropriate governance, data availability and application, digital solutions, AI, innovation, adequate skills..
- Bring **economic and social benefits for host communities**
- Building **awareness and changing mindset** (supply & demand)



# Transition pathway for tourism: what and how?



**Continuous co-creation**

**Shared objectives and areas of action**

**Flexibility in how to get engaged**

**Visibility and sharing of good practices**

**Facilitating peer learning**

**Support for common challenges**

**Collaborative follow-up**

**Yearly stock-taking of progress**

Every 3 years,  
a report to the Council

# 70 actions under five strategic areas, 27 topics

## Digital transition

- Data-driven tourism services
- Clear online information offer
- R&I for digital tools and services
- Interoperable data space for tourism
- Digitalisation of SMEs and destinations

## Green transition

- Circular tourism services
- Sustainable mobility
- Companies reducing environmental impacts
- R&I projects and pilots on sustainable tourism
- Experimenting environmental footprint methods for tourism

- Collaborative and smart destination governance
- Comprehensive tourism strategies
- Expanding tourism indicators
- Multimodal travelling
- Short-term rentals

Networking,  
Best practice sharing

Awareness raising  
(skills needs, transition benefits)

One-stop-shop to  
resources (skills, funding)

Facilitating travelling (cross-border, coordinated rules sharing)

Skills and education development

Fair and good quality jobs

Accessible tourism services

Diversification of tourism services, including resident perspective

Policy & governance

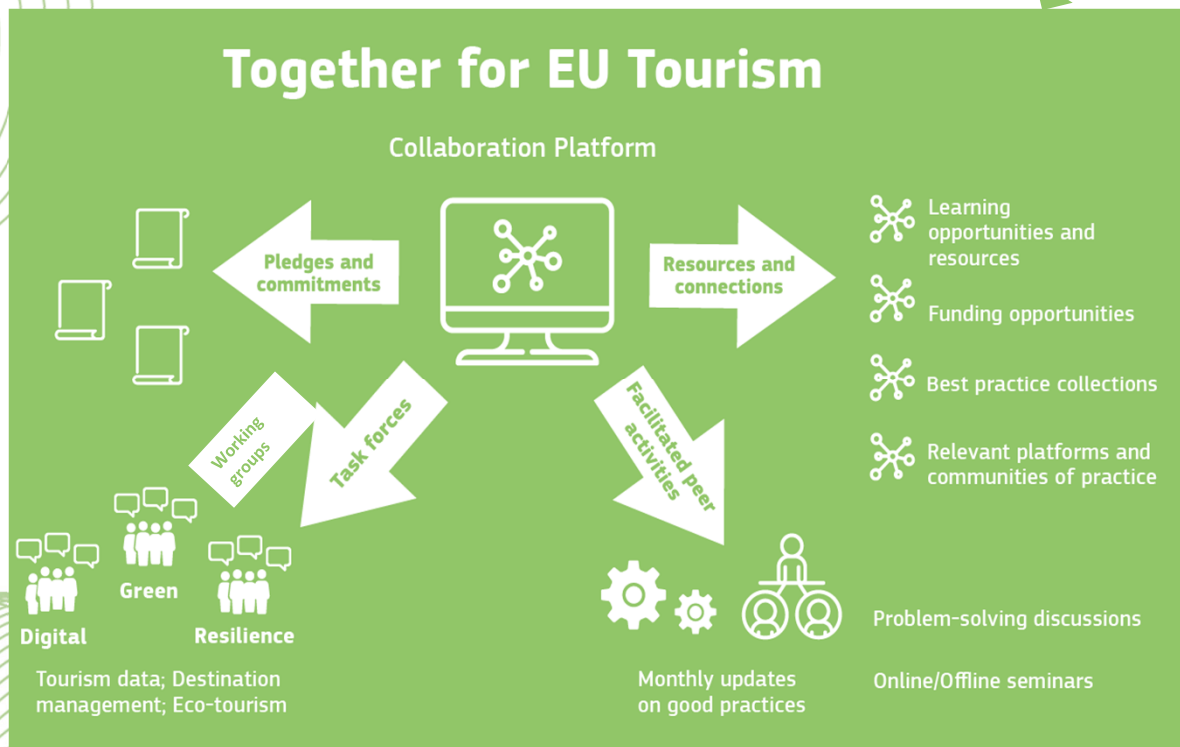
Stakeholder support

Skills & resilience

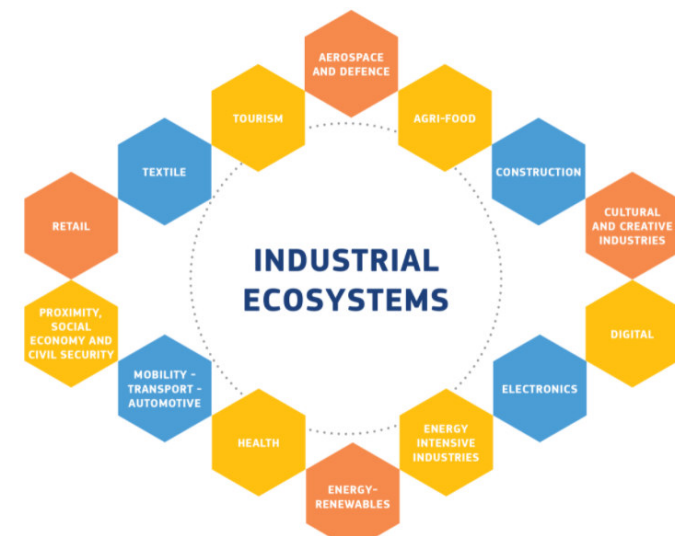


# Stakeholders Support Platform ( DG GROW tool)

[EU Transition Pathways | EU Transition Pathways \(europa.eu\)](https://europa.eu)



## Interfaces for other industrial ecosystems



# Why submit pledges & commitments?



Show **your commitment** to a greener, innovative & responsible tourism



Get **visibility** and **lead the way**



**Contribute** to EU policy

Help identify **where EU support should go**



Be part of the Together for EU Tourism (T4T) **community**

**It's easy, free and flexible!**

[EUSurvey - Survey \(europa.eu\)](https://europa.eu)

**Now integrated in the Platform:** [Stakeholders' actions | EU Transition Pathways \(europa.eu\)](#)



## Who can submit pledges?

Academic and research institutions

Business associations

Microenterprises, SMEs, large companies

Consumer / tourist organisations

Destination management/marketing organisations (DMOs)

International organisations

Networks of organisations

NGOs

Local, regional and national administrations

Trade unions, etc.



# Green transition: projects, good practice

## SMEs capacity building in green transition (SMP):

- ✓ [“Boosting sustainable tourism development and capacity of tourism SMEs through transnational cooperation and knowledge transfer”](#) (COSME 2019, 6 finalized projects: EU ECO-TANDEM, CENTOUR, ETGG2030, SUSTOUR, TOURISME, TOURBAN)
- ✓ [“Sustainable growth and building resilience in tourism – empowering support to SMEs to carry out the twin transition”](#) (SMP-COSME-2022-TOURSME)
- ✓ [“Transitioning to a more sustainable and resilient ecosystem – empowering tourism SMEs”](#) (SMP-COSME-2023-TOURSME-01)

## Supporting destinations:

- ✓ [Supporting sustainability and resilience of EU tourism destinations](#): facilitate change towards more sustainable and resilient tourism destinations, **mapping challenges, good practice, peer-to-peer learning**.
- ✓ **Promoting excellence in sustainable practice in cities and smaller destinations**: [European Capital and Green Pioneer of Smart Tourism](#): yearly promotion of excellence, [best practices](#) and content also available on [EU Smart Tourism Podcast](#)

## European Urban Agenda: cooperation of cities, innovative solutions:

- ✓ **Thematic [partnership on Sustainable Tourism](#) under European Urban Agenda**: multi-level urban cooperation, Action Plan implementation to start in Q4 2024
- ✓ **Sustainable tourism in urban areas: 7 innovative [projects selected](#) under [Second Call for Proposals EUI - Innovative Actions | EUI \(urban-initiative.eu\)](#)**: municipalities of Coimbra, Copenhagen, Argypoli, Krakow, Prato, Ravenna and Valencia.

## Supporting Member States technical capacity:

- ✓ [Technical Support Instrument – Tourism flagship](#) helped HR, ES, IT, SI, PT, MT, EL improve their tourism statistics frameworks, tourism management strategies and tools, enabling framework for SMEs.

## Cohesion policy supporting tourism:

- ✓ [Home - Interreg Euro-MED : Sustainable Tourism \(interreg-euro-med.eu\)](#);
- ✓ [Kohesio: discover EU projects in your region \(europa.eu\)](#)

## Green transition: surveys, studies, reports

- ❖ Study [“Unbalanced tourism growth at destinations \(overtourism\)”](#) + best practice, informative compendium & dialogue with destinations (2022)

### Climate action, climate change risks and adaptation:

- ❖ [Commission Communication on managing climate risks](#)
- ❖ [Regional impact of climate change on European tourism demand - Publications Office of the EU \(europa.eu\)](#)
- ❖ **European Travel Commission:** studies, surveys, promotion [Publications - ETC Corporate - ETC Corporate \(etc-corporate.org\)](#) (Climate Change and Tourism in Europe, Handbook on Encouraging Sustainable Tourism Practices, among others)
- ❖ [Eurobarometer surveys](#) on citizens choices in tourism

## Supporting circular tourism services



- ❖ **EU Ecolabel for tourist accommodations**: certifying environmental excellence with the EU Ecolabel
- ❖ **EMAS for sustainable tourism** (Eco-Management and Audit Scheme): evaluate, report and improve the environmental performance of your organization
- ❖ **Developing Product Environmental Footprint Category rules for hotel accommodation sector** : EC project 2024-2026; measure environmental impacts by applying Life Cycle Assessment method - PEF, compare and communicate your footprint to costumers

### **Relevant legislation (with co-legislators):**

- Revision of **Waste Framework Directive** (food waste targets)
- **Packaging and Packaging Waste Regulation** (relevant for hospitality sector, restrictions on single use packaging)
- **Substantiation and communication of explicit environmental claims (Green Claims)**: to empower consumers for the green transition (adopted Feb, 2024) and proposal for Green Claims Directive (with co-legislators)

# EU Tourism Dashboard

- **2<sup>nd</sup> release available online now!**
- **30+ updated and new indicators**
  - **Green**
  - **Digital**
  - **Socio-economic**
  - **Tourism demand and supply descriptors**
- Combines data from different sources (Eurostat, EEA, Eurocontrol, big data)
- Visual exploration at national and regional levels (down to NUTS 3)
- Possibility to make comparisons between destinations
- Generation of destination specific reports

Have a look at: <https://tourism-dashboard.ec.europa.eu/>



# Indicator framework

## Green pillar

- Air travel emission intensity
- Tourism GHG intensity
- Tourism energy intensity
- Share of trips by train
- Excellent bathing water
- Dependence on distant origins
- Adoption of ecological schemes

## Digital pillar

- E-commerce sales
- Enterprises using social media
- Personnel training on digital skills
- Enterprises seeking ICT specialists
- Internet speed at tourism destinations
- Accommodations listed online

## Socio-economic pillar

- Tourism intensity & seasonality
- Dependence on top 3 countries of origin
- Tourism diversity
- Average tourism expenditure
- Contribution of tourism to employment
- Economic contribution of tourism

## Tourism descriptors (demand & supply)

- |                            |                                |   |
|----------------------------|--------------------------------|---|
| ▪ Nights-spent             | ▪ Tourism density              | ▪ Presence of blue flags                  |
| ▪ Arrivals                 | ▪ Dominant tourism typology    | ▪ UNESCO sites                            |
| ▪ Tourism capacity         | ▪ Share of foreign tourists    | ▪ Share of protected/designated land      |
| ▪ Occupancy rate           | ▪ Progress of tourism recovery | ▪ High nature-based tourism opportunities |
| ▪ Average duration of stay |                                |   |



## Guide on EU funding for tourism



- Links to relevant EU programmes and websites
- Annual work programmes and calls for proposals
- Concrete project examples for inspiration
- Available in all EU languages

ERDF and Cohesion Fund  
Single Market Programme  
Erasmus+ Horizon Europe  
Creative Europe Digital Europe  
... and much more!

[Guide on EU funding for tourism \(europa.eu\)](https://europa.eu)

READY TO START

# Building Capacity for the Tourism Ecosystem

## OBJECTIVE

Promote greater competitiveness in the tourism sector, mainly for SMEs

➔ HOW? ➔

Increase the knowledge and capacity of stakeholders **regarding existing funding opportunities, improving their success in applying for funding programmes available in the EU**

## NEXT STEPS

**1**  
Analysis of the last 4 years of EU tourism funding (2019-2022)

Identification of success and failure factors when applying for funding

**2**  
Compilation of a compendium of best practices

**3**  
Manual on Dos and Don'ts  
  
Guidelines for improving the quality of applications to funding programmes & calls

**4**  
Training sessions to support tourism stakeholders, including SMEs, in successfully accessing funding

TOTAL BUDGET: € 3 000 000

[EU Funding & Tenders Portal \(europa.eu\)](https://europa.eu)



Funded by  
the European Union



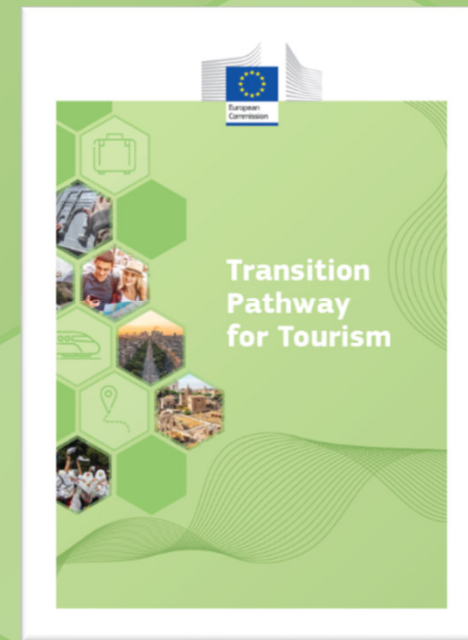
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Date

- ❑ **Tourism stakeholder event: 14 October 2024**, 09:30 - 13:00 (CEST) Brussels & online, possibility to network with T4T experts  
Register [Tourism stakeholder event - European Commission \(europa.eu\)](#)
- ❑ **Stakeholder support online platform: coming live this week!** [Transition pathway for EU Tourism | EU Transition Pathways \(europa.eu\)](#).
- ❑ **On climate change adaptation and tourism:**
  - **European Week of Regions and cities:** 8 Oct. 2024, 14:30h workshop in Brussels
  - **T4T expert group webinar:** 18 Oct. 2024, 10:00-12:00h, online (save the date)
- ❑ Webinar on **Tourism statistics by Eurostat**, 18 September 2024, 15:00h-16:00h: **watch the recording** [Tourism statistics - Eurostat \(europa.eu\)](#)



## [EU-TOURISM-PATHWAY-2030@ec.europa.eu](mailto:EU-TOURISM-PATHWAY-2030@ec.europa.eu)

- [Transition pathway policy report in 22 languages](#)
- [Council conclusions on EU Agenda for Tourism](#)
- [Stakeholder support online platform: Transition pathway for EU Tourism | EU Transition Pathways \(europa.eu\)](#)
- [Collection of stakeholder pledges and commitments](#)
- [Tourism transition pathway co-creation \(europa.eu\)](#)
- [Guide on EU funding for tourism \(europa.eu\)](#)
- [EU Tourism Dashboard](#)



Together for  
EU Tourism



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