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**“The European Commission’s
contribution to the recovery and
transition of the tourism ecosystem”**

di Valentina Superti

“Il contributo della Commissione Europea alla ripresa e transizione dell’ecosistema turismo”

di Valentina Superti ¹

Il turismo è uno degli ecosistemi industriali più importanti all’interno dell’UE. Con 3.2 milioni di imprese (delle quali 99.8 % sono PMI), l’ecosistema turismo impiega 20.3 milioni di persone e genera il 7% del valore aggiunto nel mercato interno (EUR 850 miliardi). È un’industria complessa ed estremamente frammentata, ampiamente integrata in una filiera internazionale in cui attività pubbliche e private si intrecciano. La crisi da COVID ha fatto emergere le complessità dell’ecosistema turismo, la rilevanza che ha per altri ecosistemi e per l’economia europea in generale, e le sue vulnerabilità. Il turismo infatti è stato l’ecosistema in assoluto più colpito, con perdite del fatturato fino all’80% da marzo 2020 a marzo 2021, 2 milioni di posti di lavoro persi² e 9 milioni in più a rischio³. L’articolo presenta il contributo cruciale della Commissione Europea per la ripresa e la transizione dell’ecosistema turismo. La priorità durante la crisi da COVID è stata di proteggere le imprese e i posti di lavoro, tramite lo strumento europeo di sostegno temporaneo per attenuare i rischi di disoccupazione in emergenza (SURE), la Coronavirus Response Investment Initiative Plus (CRII+) e il Quadro Temporaneo per gli Aiuti di Stato. Ha inoltre pubblicato online una guida, la ‘Guide on EU funding for tourism⁴, per aiutare l’industria, le pubbliche amministrazioni e i principali attori del settore ad identificare potenziali

fondi europei per il settore turistico. Per facilitare i viaggi in sicurezza all’interno dell’Unione, la Commissione ha invitato il Comitato Europeo di Normazione (CEN) a preparare un protocollo COVID⁵ ed un sigillo turistico per la sicurezza; ha sviluppato l’app ‘Re-Open EU’, che fornisce informazioni ufficiali sulle restrizioni e regole riguardanti i viaggi all’interno dell’UE; e ha reso possibile la creazione del ‘Certificato COVID Digitale UE’. Inoltre, ha usato le sue limitate competenze per proporre una maggiore coordinazione tra le misure restrittive degli Stati Membri, per quanto concerne la libera circolazione all’interno del territorio UE, permettendo il ritorno di viaggiatori provenienti da Paesi terzi, non-UE. La Commissione inoltre sostiene una campagna a favore dell’Europa come destinazione turistica. Infine, la Commissione Europea gioca un ruolo importante nell’incremento della resilienza dell’ecosistema turismo e nell’accelerarne l’evoluzione verde e digitale. Ha proposto la co-creazione di un percorso di transizione con importanti attori del settore, con un orizzonte al 2030 e oltre. Il percorso, una volta finalizzato, sosterrà l’impegno degli Stati Membri e degli operatori di settore verso la definizione dell’Agenda Europea per il Turismo 2030/2050, che porrà le basi per un ecosistema più resiliente, innovativo e sostenibile.

¹ Direttrice per il Turismo e la Prossimità presso la Direzione Generale per il Mercato interno, industria, imprenditoria e PMI della Commissione Europea.

² WTTC (2021), Economic Impact Reports.

³ European Commission Joint Research Centre (2020), ‘Behavioural changes in tourism in times of Covid-19: Employment scenarios and policy options’

⁴ https://ec.europa.eu/growth/sectors/tourism/funding-guide_en

⁵ https://ec.europa.eu/growth/content/new-european-tourism-covid-19-safety-seal-available_en

“The European Commission’s contribution to the recovery and transition of the tourism ecosystem”

By Valentina Superti⁶

Tourism is one of the most important EU industrial ecosystems. With 3.2 million firms (99.8% of SMEs), the EU tourism ecosystem employs 20.3 million people and generates 7% of EU value added (EUR 850 billion). It is a complex and highly fragmented industry, largely integrated in a global value chain with public and private activities often intertwined. The COVID crisis revealed the complexity of the tourism ecosystem, its fundamental importance for other ecosystems and the European economy in general, but also its vulnerabilities. In fact, of all EU ecosystems, tourism took the longest and harder hit, with a drop in revenues up to 80% from March 2020 to March 2021, 2 million jobs lost⁷ and up to 9 more at risk⁸. The article presents the European Commission’s key contribution to the recovery and transition of the tourism ecosystem. Its first priority during the COVID crisis was to help saving businesses and protecting jobs, done through the Support instrument to mitigate Unemployment Risks in an Emergency (SURE), the Coronavirus Response Investment Initiative Plus (CRII+) and the Temporary Framework for State Aid. It also published the ‘Guide on EU funding for tourism’⁹, to help industry, public authorities and all stakeholders to find possible EU

funding available for the tourism sector. In order to facilitate safe travel within the Union, the Commission invited the European Committee for Standardisation (CEN) to prepare a tourism COVID safety protocol and seal¹⁰, developed the ‘Re-Open EU’ App, which provides official information on travelling rules and restrictions in the EU, and enabled the creation of the ‘EU Digital COVID Certificate’. Additionally, it used its limited powers to propose a better coordination of Member States’ measures restricting free movement within the EU territory and allowing the return of international travellers. The Commission also supports a campaign promoting travel in Europe. Finally, the European Commission is an active player when it comes to increasing the resilience of the tourism ecosystem and accelerating its green and digital twin transitions. It proposed the co-creation of a transition pathway with stakeholders, to accompany the industry’s transitions towards 2030 and beyond. The finalised pathway will also support the effort of jointly building with Member States and tourism stakeholders the European Agenda for Tourism 2030/2050, which hopefully serves to build a more resilient, innovative and sustainable ecosystem.

⁶ Director for Tourism and Proximity at the European Commission Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW).

⁷ WTTC (2021), [Economic Impact Reports](#).

⁸ European Commission Joint Research Centre (2020), ‘Behavioural changes in tourism in times of Covid-19: Employment scenarios and policy options’.

⁹ https://ec.europa.eu/growth/sectors/tourism/funding-guide_en

¹⁰ https://ec.europa.eu/growth/content/new-european-tourism-covid-19-safety-seal-available_en

“The European Commission’s contribution to the recovery and transition of the tourism ecosystem”

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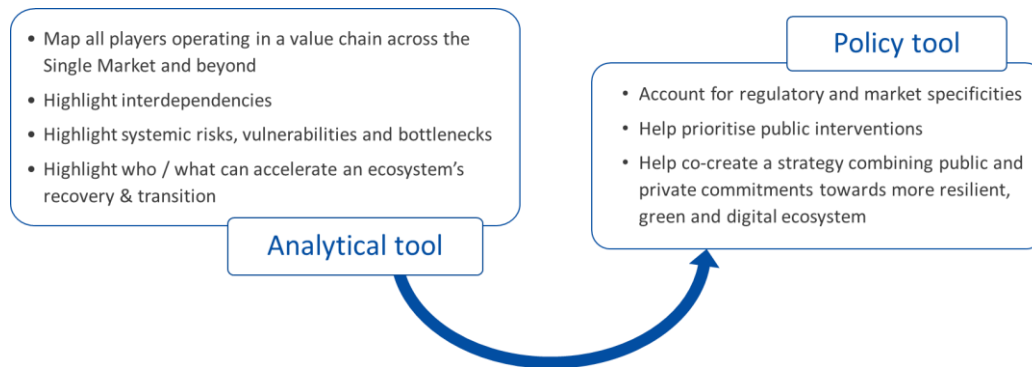
1. Why a new approach to industrial sectors?

The industrial ecosystems approach is underpinning the new Industrial Strategy for Europe presented by the European Commission in March 2020. Building on the value chain approach introduced a decade ago¹¹, it improves the way we factor in links between sectors and firms across countries, their possible evolution, their capacity to absorb or adapt to shocks (resilience). Tourism is one of the 14 ecosystems identified. Disruptions caused by the COVID crisis revealed the complexity of the tourism ecosystem,

its fundamental importance for other ecosystems and the European economy in general, but also its vulnerabilities.

The ecosystem approach (graph 1) was used to identify: (1) key emergency measures to support tourism during lockdown periods; (2) ways to accelerate its restart; and (3) a transition pathway to build it back better in view of the EU green and digital ambitions for 2030-2050.

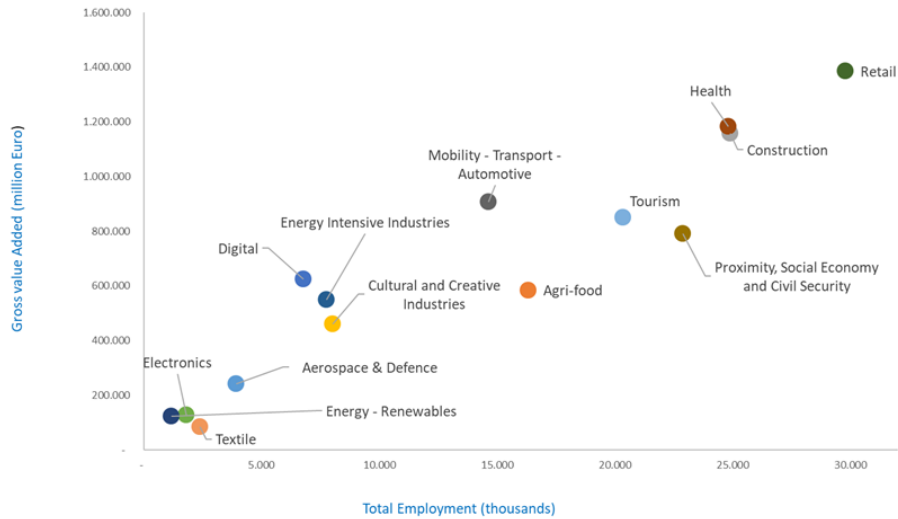
Fig. 1 - The ecosystem approach



Source: European Commission, 2021

¹¹ ECORYS (2009), ‘[Study on the Competitiveness of the EU tourism industry](#)’, for the European Commission.

Graph. 1 - The importance of the tourism ecosystem



Source: European Commission, 2021

2. The EU tourism ecosystem: its economy and its geography

2.1 A complex value chain

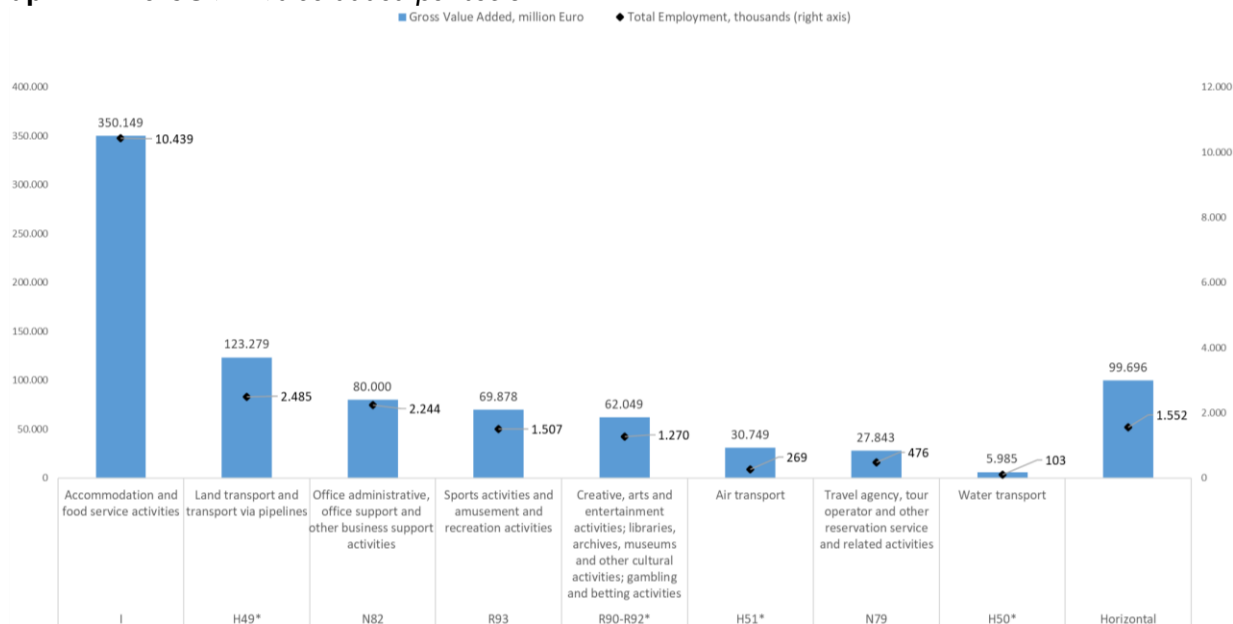
Tourism is a complex and highly fragmented industry, largely integrated in a global value chain with public and private activities often intertwined. Under the European Commission's definition, the EU tourism ecosystem (graph 2) comprises off-line and on-line information and services providers (tourist offices, digital platforms, travel technology providers), travel agents and tour operators,

accommodation suppliers, destination managing organisations, visitor attractions (museums, theme parks, exhibition centres, ...) and tourism-related transport activities (travel infrastructures, airlines, train, cruises, coaches, short term car rental, ...). It has particularly close links with the Cultural and Creative Industries, Construction and Agri-food ecosystems¹². The exhibition and trade fairs sector is also critically important for electronics, automotive, etc. With 3.2 million firms (99.8% of SMEs), the EU tourism ecosystem employs 20.3 million people and generates 7% of EU value added (EUR 850 billion).

¹² For instance, 20% of spirits produced in the EU are sold through EU airports and another 50% are consumed in restaurants and bars (spiritsEurope). Many small distilleries and craft beers producers also get part of their

revenues from spirit tourism (1 million visitors in Ireland). The COVID impact on tourism therefore had a direct knock-on effect on the beverage industry.

Graph. 2 - Pre-COVID value added per sector



Source: Eurostat, National Accounts. Data from 2018 (or latest year available).

2.2 Domestic, intra-EU and long haul markets

If domestic tourism remains the most important market in many EU countries, intra-EU and extra-EU travellers have been taking a growing importance. Pre-COVID, domestic tourism (leisure and business) usually accounted for 65% of visitor spend, with business spending (domestic and international) around 19% - see section 4. The 10 most important source markets outside the EU generated a surplus of more than € 64 billion in 2019 (tab 1). Over the last 10 years, the EU tourism ecosystem lost world market shares¹³.

Tab. 1 - EU 27 balance of payments 'Travel'

	2017	2018	2019
United Kingdom	20.541,3	20.525,6	21.182,8
Switzerland	9.603,3	10.074,6	10.121,6
United States	3.747,9	5.732,9	7.724,4
China except Hong Kong	6.285,4	7.437,6	6.859,7
Russia	6.496,8	5.960,8	5.881,9
Norway	6.182,1	4.329,1	3.954,3
Canada	1.705,6	2.077,4	2.427,2
Brazil	2.058,4	1.980,0	2.239,0
Japan	1.668,3	2.294,4	1.756,0
Australia	1.859,8	1.474,3	1.564,9
South Korea	1.081,5	1.052,3	977,9
	61.230,4	62.939,0	64.689,7

Source: Eurostat. Note values in € million.

¹³ UNWTO (2018), 'European Union Tourism Trends', Madrid, p.63.

Europe being a mature travel market, it progressed in absolute terms but less than other regions (i.e. emerging markets). Pre-COVID growth was fuelled by megatrends including demographic changes (in 2019, 33% of the EU population was over 55-year-old, with often more time and resources to travel), quick development of affluent middle classes in emerging economies (e.g. Asia) and low cost business models.

3. The EU tourism ecosystem: its society

3.1 Exceptionally high number of actors and stakeholders

Policies targeting or affecting the EU tourism ecosystem are the result of multiple interactions between public actors and stakeholders at various levels. Compared to other ecosystems, this multilevel governance is particularly complex because of the exceptionally high number of stakeholder associations and their heterogeneity. Today there are more than 60 European stakeholder associations¹⁴ actively engaged in lobbying on tourism issues, where for example the automotive ecosystem has 3 key associations (manufacturers, suppliers and car dealers).

3.2 Heterogeneity of European stakeholder associations

The large majority of stakeholder associations are interest groups representing employers or workers

of specific tourism sectors. They coexist with a number of advocacy coalitions (fighting for a cause) and a much smaller number of epistemic communities (analysing the functioning and likely evolution of various aspects of the ecosystem). Advocacy coalitions started appearing in the 1990s, in parallel with the new societal priorities in many Member States as well as the extension of EU competences (environmental sustainability, accessible tourism for people with disabilities, slow tourism and cycling...).

The 2008 economic and financial crisis led to a significant consolidation among these European Associations. A number of them disappeared especially among advocacy coalitions or volunteers associations (e.g. greeters). Others merged or became the subsidiary of US-based associations (e.g. GBTA for business travel) extending their operations to Europe, Asia and the Middle East. The number of Associations is likely to further decrease in the medium term for economic reasons but also in response to the European Commission regular calls for this industry to speak with one voice or at least create an operational platform¹⁵. As of June 2021, the COVID crisis did not result in a reduction in the number of stakeholders associations at EU level but lead to a multiplication of joint initiatives (joint letters, position papers, communication campaigns ...) within the tourism ecosystem or with associations from other ecosystems¹⁶.

¹⁴ This tally does not take into account international associations without a European chapter but which lobby EU institutions.

¹⁵ This is what happened in the USA, where the US Travel Association was set up in exchange of a number of

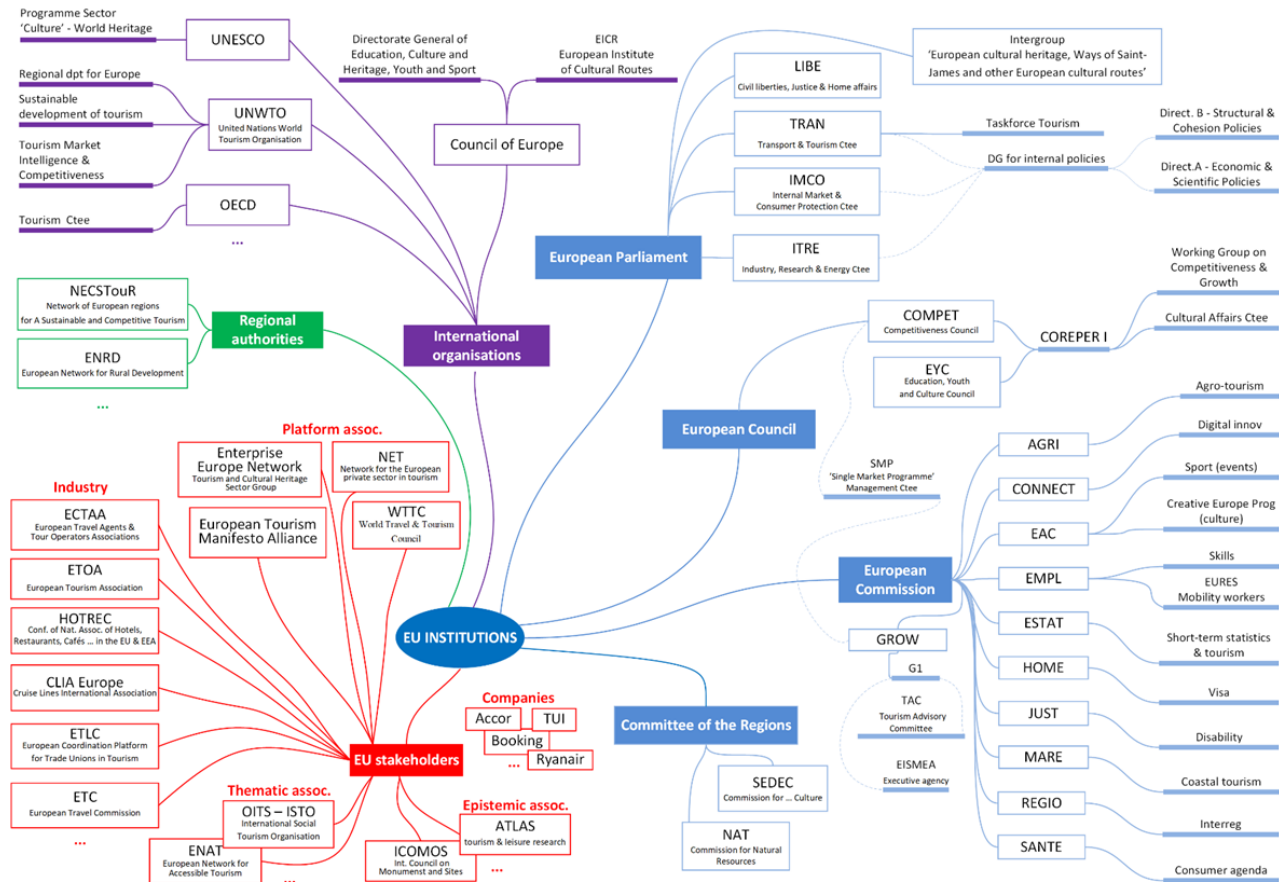
federal measures including the creation of a tourism promotion agency, 'Brand USA'.

¹⁶ e.g. [Joint Statement of 27 April 2021](#) signed by hospitality (HOTREC), agri-food (The Brewers of Europe, spiritsEUROPE ...) and retail associations (Eurocommerce ...).

This could be seen as a confirmation that companies and national stakeholders see the EU

level as very important for the restart and recovery of the tourism ecosystem.

Fig. 2 - Map of the EU tourism ecosystem's actors and stakeholders



Source: E. Philippart, ULB – Paris 1 Sorbonne. Note: Dotted connecting lines on the governance map indicate the absence of a direct / exclusive hierarchical link.

4. Impact of the COVID crisis on the ecosystem

4.1 Drop in revenues

Of all EU ecosystems, tourism took the longest and harder hit. With a drop in revenues of up to 80% from March 2020 to March 2021 for airlines, airports, exhibition centres, etc., with 2 million jobs lost¹⁷ and up to 9 more at risk¹⁸, it remained at the bottom of the business confidence indicator until May 2021 (see graph. 3). While emergency measures at national and EU level (see Section 5) helped preventing a wave of bankruptcies, they did not eliminate financial distress.

By end March 2021, it was estimated that 74% of the tourism ecosystem's firms did not have the cash flow necessary to meet their debt obligations. This means that a large fraction of firms which were perfectly healthy before the crisis are in a very difficult situation.

4.2 Indebtedness and investment gap

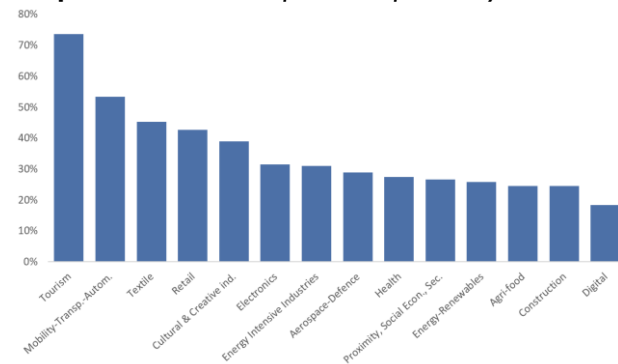
High level of indebtedness is reducing the capacity of most tourism sectors to invest in the development of more resilient supply chains and new services (e.g. decarbonised, slow tourism). The investment gap for the tourism ecosystem is estimated at EUR 161 billion for 2020-21¹⁹.

4.3 Resilience

Resilience varied widely across Member States, the least affected being Denmark (travel and tourism contribution to its 2020 GDP felt by 29% compared to 2019) and the worst affected being Cyprus (with a fall of 74%, see tab 2). The most resilient destinations were those relying heavily on domestic tourism, specialised in nature tourism and/or with a large supply of short-term accommodation rentals distributed through platforms like Airbnb.

The capacity to replace some international travellers with domestic travellers was also very important in terms of damage limitation. This was easier for Member States with a small tourism capacity compared to its population and a high income per capita (e.g. Belgium or Denmark).

Graph. 3 - Share of illiquid firms per ecosystem



Source: Annual Single Market Review 2021, p.18

¹⁷ WTTC (2021), [Economic Impact Reports](#).

¹⁸ European Commission Joint Research Centre (2020), ['Behavioural changes in tourism in times of Covid-19: Employment scenarios and policy options'](#).

¹⁹ SWD (2020) 98 final, 'Identifying Europe's recovery needs', p. 41.

The most vulnerable destinations were those highly dependent on business travel, city tourism and VFR (Visit friends & relatives).

Dependence on international travellers was an aggravating factor for countries characterised by a very large tourism capacity relative to its population and by a middle to low income per capita (e.g. Greece or Portugal).

High dependency on air connectivity also explains largely why Cyprus or Malta were worse off than Croatia (which had the possibility to target travellers from countries with direct road and rail connections). Resilience also varied widely across tourism sectors and firms. The most resilient firms were often those having low fixed costs, being family owned, and able to partially switch to other markets.

For instance, firms specialised in ropax (roll-on/roll-off passenger) ferries managed to compensate partially the drop in passengers (-80%) thanks to freight services in higher demand. It was also the case to a lesser extent for hotel groups able to turn

rooms into teleworking spaces and secure deals to host people recovering from COVID or on quarantine. The most vulnerable sectors were those most exposed to the consequences of the lack of coordination among countries. Companies providing international transport services were confronted with different and sometimes contradictory obligations at departure and arrival. For instance, as of June 2021, the very popular Italy-Croatia-Greece cruise circuit is technically not possible because the Italian safety protocol does not allow passengers to go to local restaurants, markets, ..., to maintain the 'bubble', where the Greek government authorises cruises only if passengers have the possibility to buy local services during stopovers. The only option left for cruises was to propose itineraries within one country. These domestic cruises are useful to test safety protocols and reassure tentative customers but are often operating at a loss as they usually attract fewer passengers.

Tab. 2 - Tourism resilience in 2020 at country level

	Denmark				Italy				Cyprus			
	2019		2020		2019		2020		2019		2020	
	€ bil	%	€ bil	%	€ bil	%	€ bil	%	€ bil	%	€ bil	%
International spending	8,52	45	3,92	30	45,64	24	17,34	19	2,76	91	0,51	81
Domestic spending	10,38	55	8,98	70	142,81	76	71,92	81	0,28	9	0,12	19
Leisure spending	11,53	61	7,80	60	151,52	80	72,73	81	2,81	92	0,57	90
Business spending	7,37	39	5,10	40	36,93	20	16,53	19	0,23	8	0,06	10
Contribution to GDP	18,90		12,90		188,45		89,26		3,04		0,63	
	YoY: - 29%				YoY: - 51%				YoY: - 74%			

Source: WTTC (2021), Economic Impact Reports

In many instances, these differences in national policies (which deter potential travellers and increase transporters' costs) led companies to suspend or stop their activities altogether. Despite State aid to airlines, the number of routes to / from European airports felt dramatically²⁰: 14.000 before Covid against 5.500 in April 2021. The type of travel restrictions and safety protocols also had a major impact: the drop in passenger traffic at EU airports in June 2021 was still around -80%, where the drop at Russian and Turkish airports was around -45%, this largely thanks to lighter travelling conditions.

In other instances, the suspension of activities was linked to the volatility of public policies. Several sectors need substantial lead-time to organise their activities. It takes for instance minimum 4 to 6 months for event organisers to relaunch international trade fairs (i.e. finding a timeslot in an exhibition centre, convincing exhibitors to return, visitors to book ...). As long as rules regarding travelling and attendance thresholds change every month, if not every week, the exhibition industry cannot resume its operations. This increases the risk of international fairs being relocated outside Europe (knowing that, before COVID, Europe was hosting over 90% of world fairs, which are critically important for off-season periods).

Next to the lack of coordination and the lack of predictability, some sectors were not able to maintain their level of activities because they could not retain key workers: for example, online travel agencies lost IT specialists recruited in the digital ecosystem; the exhibition industry lost stand builders

recruited in the construction ecosystem; and the hospitality industry saw workers moving to other customer service sectors like contact centres. Heavily indebted and not knowing when they will return to profitability, these sectors are struggling to hire back their workers, with the ensuing risk of not being able in the short-term to meet demand and delay the ecosystem's recovery (supply crunch).

5. EU measures to restart the ecosystem

Recognising from the beginning how serious the crisis was for the tourism ecosystem, the European Commission's first priority was to help saving businesses and protecting jobs. This was notably done via the Support instrument to mitigate Unemployment Risks in an Emergency (SURE), the Coronavirus Response Investment Initiative Plus (CRII+) and the Temporary Framework for State Aid (helping Member States quickly setting up national support schemes).

In addition to emergency measures for enterprises hit by the COVID-19 crisis, the EU supports tourism recovery and transition through the Recovery and Resilience Facility and a number of funding options detailed in the 'Guide on EU funding for tourism'²¹.

5.1 Travelling within Europe

Its second priority was to help tourism restarting for good. The restart of domestic tourism being under the sole competence of the Member States, the Commission focused its efforts on non-essential travelling with the Schengen area.

²⁰ ACI-Europe, [Industry data](#).

²¹ https://ec.europa.eu/growth/sectors/tourism/funding-guide_en

The Commission used its limited powers to propose a better coordination of Member States' measures restricting free movement within Schengen in response to the COVID-19 pandemic. Its latest proposal to amend Council recommendation 2020/1475 aimed at revising the way COVID risks are assessed and managed. Its proposal was adopted by the Council on 14 June 2021²².

In order to facilitate safe travel within the Union, the Commission invited the European Committee for Standardisation (CEN) to prepare a tourism COVID safety protocol and seal²³. Since 19 May 2021, Member States and tourism industry can use it to reassure travellers coming from other European countries.

The Commission also developed the 'Re-Open EU' website²⁴ and App, which provides official information on travelling rules and restrictions in the EU. Its new interactive map allows travellers to plan their trips and have a clearer idea of the epidemiological situation at destination.

It invited the association of National Tourism Offices in Europe, the 'European Travel Commission', to design a promotion campaign aimed at restoring confidence in and desire to travel. Thanks to EU co-funding and the support of 33 partners, the 'Open-up to Europe' campaign was launched on 1st June 2021.

The most important restart measure however was probably the creation of the 'EU Digital COVID Certificate'²⁵. On 14 June 2021, EU co-legislators formally approved the certificate proposed by

the European Commission. Entering into force on 1st July 2021, but already used on a voluntary basis in June by more than half of the Member States, this certificate should allow many of our citizens to travel to another European country without quarantine or additional testing.

For those who still need to be tested, the Commission recommended Member States to consider the use rapid antigen tests for travellers. That recommendation of November 2020 was followed by its decision to mobilise €100 million under the Emergency Support Instrument for directly purchasing over 20 million tests that were delivered to 24 Member States from February 2021. On 17 June, EASA and ECDC (the EU agencies respectively responsible for aviation safety and for disease control) took one more step: the update of their joint guidelines recommends to consider Rapid Antigen Detection testing before departure or upon arrival for passengers arriving from very high-risk (dark red) countries or areas with community circulation of Variants of Concern.

Taking into account vaccination progress and the latest scientific evidence, these guidelines also recommend reducing physical distancing in airports from 1.5 m to 1 m, which would allow airports operating at 60% of their normal capacity.

²² [Council Recommendation \(EU\) 2021/961](#) of 14 June 2021 amending Recommendation (EU) 2020/1475 on a coordinated approach to the restriction of free movement in response to the COVID-19 pandemic, OJ L 213.

²³ https://ec.europa.eu/growth/content/new-european-tourism-covid-19-safety-seal-available_en

²⁴ <https://reopen.europa.eu/en>

²⁵ [Regulation \(EU\) 2021/953](#).

All these measures contributed to a strong increase in demand. By mid-June 2021 (according to regular surveys conducted by ETC with the financial support of the EU), 70% of Europeans were planning to travel in the next six months, with half wishing to visit another European country.

5.2 Travelling to the EU

The Commission was equally active in preparing the ground for the return of international travellers. The ETC & Eurail 'Long-Haul Travel Barometer' indeed showed, at the time of writing, that demand for Europe was also progressing in the 5 markets (Brazil, China, Japan, Russia, and the United States) monitored every 4 months, but to a lesser extent than intra-EU travel. Only 2 in 5 respondents in the USA and Russia were optimistic about visiting Europe in summer 2021. Only 1 in 5 in Japan. Chinese travellers were the most eager, with 53% of respondents enthusiastic about travelling abroad and 1 in 4 confident that, if permitted, they will travel to Europe before October 2021.²⁶

The reopening of the EU to 'non-essential' international travellers obviously depends on the epidemiological situation of their home country. The Commission therefore proposed the adoption of a Council Recommendation setting criteria for determining the level of risk from third countries and how to manage this risk.

On 30 June 2020, the Council of the EU adopted Recommendation 2020/912 on the temporary restriction on non-essential travel into the EU and the possible lifting of such restriction. This Recommendation has been amended on several occasions to adapt it to the evolution of the pandemic.

The latest amendments (20 May 2021) contribute to EU progressive re-opening with : (1) new criteria allowing to lift restrictions for all travellers from more third countries; (2) the lifting of restrictions on non-essential travel for third-country travellers who have received the last recommended dose of vaccine approved by the European Medicine Agency (at least 14 days before arrival) and the possibility to do so also for those having received a vaccine on the World Health Organisation list (which as of the 1st of June 2021 includes 2 Chinese vaccines).

This opening was to be offset by the introduction of an emergency brake to use where the epidemiological situation of a third country or region worsens quickly.

In parallel with bilateral efforts to secure the mutual recognition of COVID certificates, the Commission has been supporting international initiatives in favour of travel facilitation, which include the 'Blueprint for safer international travel', endorsed by the OECD Ministerial on 31 May 2021 at the initiative of the Spanish government, and the 'Rome guidelines for the future of tourism' endorsed by the G20 at the initiative of the 2021 Italian presidency.

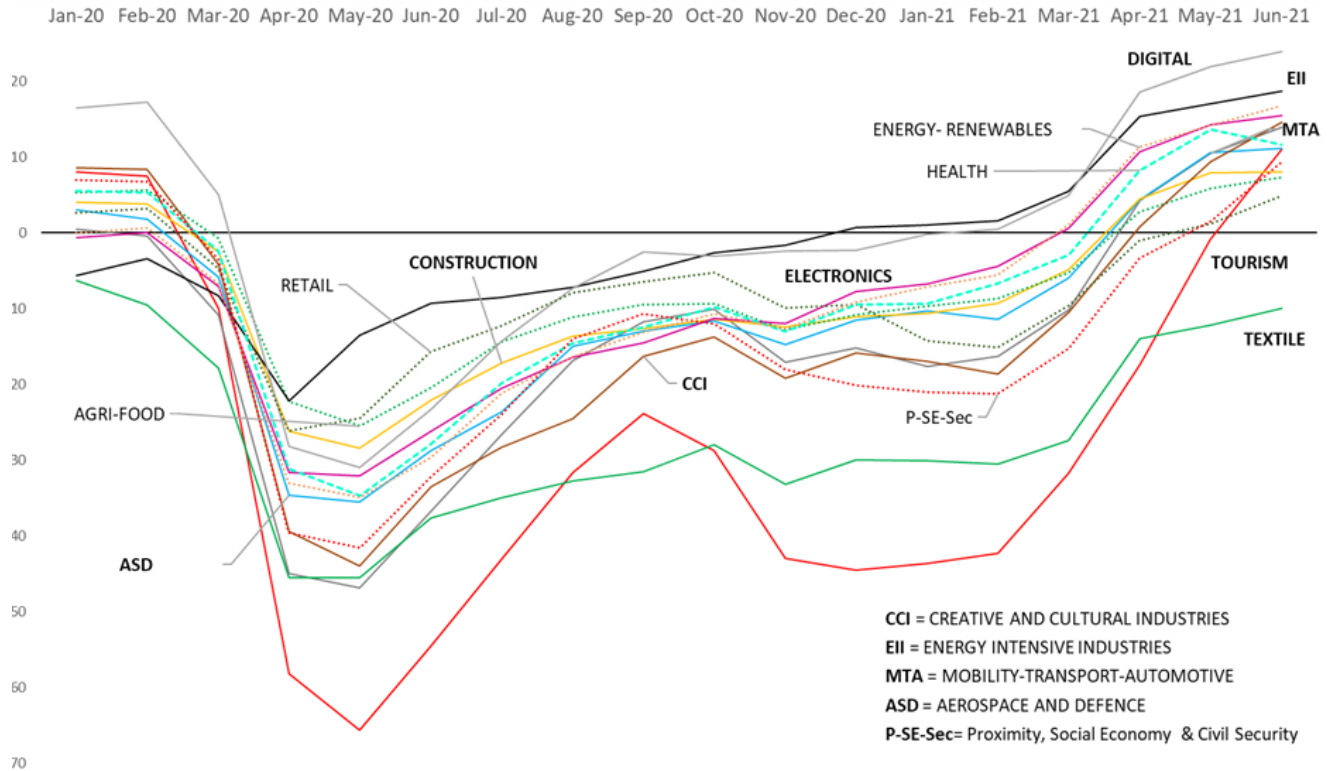
²⁶ European Travel Commission, [Long-Haul Travel Barometer 2/2021](#).

5.3 Industry growing optimism

In May 2021, the economic sentiment of the tourism ecosystem came close to pre-COVID level.

For the first time since March 2020, business managers felt more optimistic about their economic prospects.

Graph. 4 - Economic sentiment per ecosystem



Source: European Commission, DG GROW elaborations on data by the Joint Harmonised EU Programme of Business and Consumer Surveys (Eurostat).

6. The recovery and long-term transformation of the ecosystem: first steps

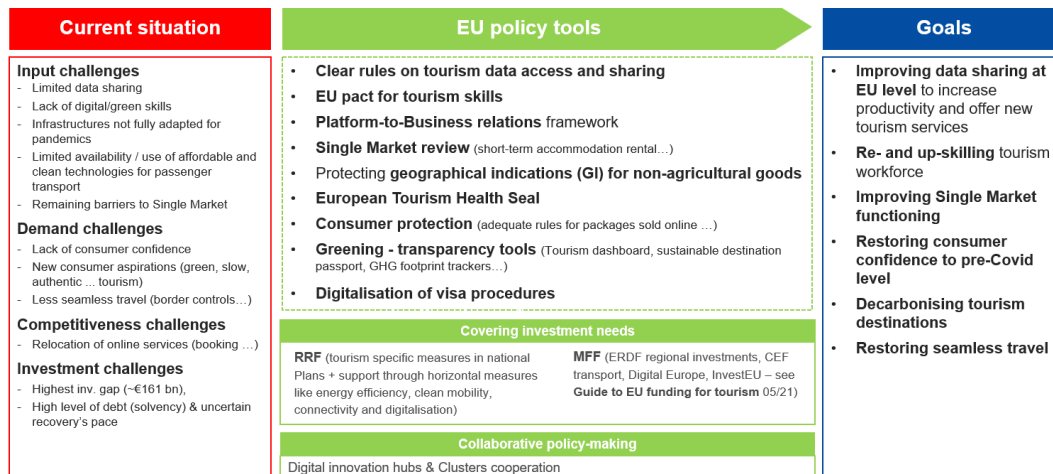
6.1 Industrial Strategy Update

Building on the results of the October 2020 European Tourism Convention²⁷, the 'Industrial Strategy update'²⁸ released by the Commission on the 5th of May 2021:

- assesses key opportunities and challenges for the future of the tourism ecosystem;

- flags 'transformative initiatives', i.e. the main areas for action expected to have a major impact on its sustainability, digitalisation and resilience; and
- describes some of the most relevant actions and policy tools which complement these transformative initiatives (see fig. 3).²⁹

Fig. 3 - Industrial Strategy update: the EU toolbox for tourism



Source: European Commission, 2021

²⁷ Organised by the European Commission as a first step towards a new 'European Agenda for Tourism', the [Convention](#) gathered virtually 600 participants, including representatives of public authorities at EU, national and regional levels, representatives of stakeholders, international organisations and academics.

²⁸ Commission Staff Working Document, '[Annual Single Market Report 2021](#)' (SWD (2021)351) accompanying the Communication from the Commission 'Updating the

2020 New Industrial Strategy: Building a stronger Single Market for Europe's recovery' ([COM \(2021\) 350](#)).

²⁹ This list of actions and tools is not exhaustive. The Communication does not for instance cover competition and trade policies, but underlines the importance of these horizontal policies for all ecosystems. The Commission intends to propose a revision of State aid rules and guidelines before the end of 2021.

6.2 Transition pathway

The Industrial Strategy update also underlines the need to quickly increase the resilience of all ecosystems and accelerate their green & digital twin transition. To do so, it proposes the co-creation of transition pathways with stakeholders, to identify actions and challenges, including for instance investment or technology needs, to accompany the industry's transitions towards 2030 and beyond.

The first 'transition pathway' to be defined has been for the tourism ecosystem, recognising that it has been most heavily affected by the crisis and that it faces the most important challenges meeting climate and digital goals.

A Commission Staff Working Document on a transition pathway for the tourism ecosystem³⁰ was released on 21 June 2021. It presents (1) possible scenarios for 2030; (2) possible joint objectives regarding resilience, sustainability and digital innovation; (3) actions scheduled by the Commission (legislative framework, funding, guidance and training, monitoring, awareness raising, best practice sharing ...); and (4) possible actions that tourism actors and stakeholders could pursue at various levels.

The objective of this document is to launch discussions and a bottom-up process for defining necessary actions, targets and milestones, and invite concrete commitments and investments among the tourism ecosystem stakeholders. Stakeholders are invited to provide contributions through and online consultation³¹ and targeted workshops.

The finalised pathway will also support the effort of jointly building with Member States and tourism

stakeholders the European Agenda for Tourism 2030/2050, which hopefully serves to build a more resilient, innovative and sustainable ecosystem.

7. Conclusions

The tourism ecosystem was growing steadily in Europe and globally, until the COVID-19 pandemic drastically changed travelling, eating out, recreational and cultural activities.

The COVID-19 crisis has hit hard the tourism ecosystem, its turnover, the numbers of its companies and workers. As a result, the EU and the Member States have mobilised unprecedented efforts to help the ecosystem surviving and now recovering.

The recovery is an opportunity to address changing consumer needs and steer the tourism ecosystem towards more resilient, digital, and greener practices.

This transition will only be possible if all stakeholders - industry, associations, international organisations, NGOs, public authorities, destination organisations, European institutions, etc. – pull together.

The European Commission has therefore invited stakeholders to co-create a Transition Pathway for a more resilient, sustainable and innovative tourism ecosystem.

³⁰ SWD (2021)164, at <https://ec.europa.eu/docsroom/documents/45977>.

³¹ <https://ec.europa.eu/eusurvey/runner/TourismTransitionPathway>.

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Direzione | Francesco di Cesare
Organizzazione | Anthony A. La Salandra

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Risposte Turismo s.r.l.

Giudecca 624 | 30133 Venezia

tel. +390413093260 | fax. +390418520077

www.risposteturismo.it | info@risposteturismo.it