



Council of the
European Union

Brussels, 4 November 2022
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COMPET 845
TOUR 70

NOTE

From: General Secretariat of the Council
To: Permanent Representatives Committee

Subject: *Preparation of the Council (Competitiveness (Internal Market, Industry, Research and Space)) on 1-2 December 2022*
Conclusions on European Agenda for Tourism 2030
- Approval

1. The Council conclusions on ‘Tourism in Europe for the next decade: sustainable, resilient, digital, global and social’ of 27 May 2021¹, invited the Commission and Member States, in participation with relevant stakeholders, to design a European Agenda for Tourism 2030/2050.
2. The Presidency proposed draft Council conclusions on ‘European Agenda for Tourism 2030’, and the Working Party on Competitiveness and Growth (Tourism) examined the draft conclusions at its meetings on 9 and 26 September, and 13 and 28 October 2022.
3. At its meeting of 28 October, following the introduction of a number of modifications to the Presidency compromise documents 13956/22 and 13956/22 COR1, the Working Party on Competitiveness and Growth (Tourism) reached an agreement in principle on the content of the draft conclusions. This agreement was confirmed at the expiry of a silent procedure that ended on 31 October 2022.

¹ 8881/21.

4. In paragraph 15, the last part has been put in square brackets pending the publication of the Commission proposal²: “[; *in this context, TAKES NOTE of the Commission proposal on a common EU regulatory framework for short-term accommodation rentals*]”. The square brackets will be removed once the Commission proposal has been published or the text will be deleted if the Commission decides to publish its proposal later than the approval of the draft Council conclusions.
 5. The Permanent Representatives Committee is therefore called upon to confirm the agreement reached at technical level as set out in the Annex to this note, in view of submitting the draft conclusions for approval by the Council (Competitiveness) on 1 December 2022.
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² The publication of the proposal is expected in November 2022.

Draft Council conclusions on ‘European Agenda for Tourism 2030’

THE COUNCIL OF THE EUROPEAN UNION,

1. HAVING REGARD to Article 195 and Article 6 of the Treaty on the Functioning of the European Union, as regards the EU supporting, coordinating and supplementing the actions of Member States in the area of tourism, and with due regard to the respective spheres of competence of the Member States and the Union, as well as the principles of subsidiarity and proportionality.
2. RECALLING
 - its conclusions on ‘The competitiveness of the tourism sector as a driver for sustainable growth, jobs and social cohesion in the EU for the next decade’ of 27 May 2019³;
 - its conclusions on ‘Tourism in Europe for the next decade: sustainable, resilient, digital, global and social’ of 27 May 2021⁴, where the Council invited the Commission and Member States, in participation with relevant stakeholders, to design a European Agenda for Tourism 2030/2050;
 - its conclusions on ‘Special Report No 27/2021 by the European Court of Auditors: EU support to tourism: need for a fresh strategic orientation and a better funding approach’ of 3 March 2022⁵.

³ 9707/19.

⁴ 8881/21.

⁵ 6829/22.

3. UNDERLINES its determination to promote sustainable tourism, taking into consideration all the key dimensions of economic, environmental, cultural and social sustainability, in response to, among other factors, climate change and loss of biodiversity, in accordance with the United Nations 2030 Agenda for Sustainable Development and its commitment to support tourism that creates sustainable jobs and promotes local culture, products and services.
4. ACKNOWLEDGES that tourism significantly contributes to economic development across Europe and can help to achieve the objectives of various EU, national, regional and local policies thanks to its cross-cutting economic and social dimensions and the high ratio of micro, small and medium-sized enterprises operating directly or indirectly along the tourism value chain; IS AWARE that various EU policy domains, such as transport, employment or consumer protection, often impact the tourism ecosystem due to its cross-sectoral nature.
5. WELCOMES the outcome of the process of co-creation with Member States and the stakeholders led by the Commission under the Transition Pathway for Tourism⁶ as a follow-up to the communication from the Commission on ‘Updating the 2020 New Industrial Strategy: building a stronger single market for Europe’s recovery’⁷, which helped to identify possible topics, actions, key actors, conditions and objectives for the green and digital transition of tourism towards a more resilient ecosystem.
6. RECOGNISES the work done by the Commission, Member States and stakeholders to build the basis for the European Agenda for Tourism 2030 through the co-creation process as contained in these conclusions; in this context ACKNOWLEDGES that the co-implementation process, as part of the Transition Pathway for Tourism, is a good starting point for strengthening cooperation among tourism stakeholders, the Commission and the Member States.

⁶ 10089/21.

⁷ 8553/21.

7. **STRESSES** the importance of promoting a sustainable, innovative and resilient tourism ecosystem, given that:
- the EU is a top destination for both international visitors and its own residents;
 - in 2019, before the COVID-19 pandemic, the EU tourism ecosystem represented 12.9 % of EU Gross Value Added and 15.8 % of employment;
 - with the pandemic, revenues of some sub-sectors dropped by up to 80% of net value, and around 11 million jobs in the EU have already been affected in the tourism ecosystem in 2020;
 - the tourism ecosystem is composed of several economic sectors, which have their own specific sectoral approaches, where over 99 % are micro, small and medium-sized enterprises.

Impact of recent crises on tourism

8. **UNDERScores** that the COVID-19 pandemic has had a particularly devastating effect on the tourism ecosystem and has led to significant losses of income, employment and staff.
9. **EMPHASISES** that re-opening and re-starting the tourism ecosystem provides an opportunity to leverage the COVID-19 recovery phase for a green and digital transformation towards a more resilient tourism ecosystem.
10. **CONDEMNS** Russia's unprovoked and unjustified military aggression against Ukraine, and **REGRETS** its economic, political and humanitarian effects, including its negative impact on tourism, among other sectors, particularly in countries close to Ukraine.
11. **RECOGNISES** that despite the continuing insecurity, the tourism ecosystem has shown solidarity towards refugees from Ukraine, for example by providing temporary accommodation for relocated citizens, supporting their integration and where possible, by providing employment opportunities.

12. IS CONCERNED that high inflation, rising prices on energy and food products, disruptions of supply chains, and insecurity related to the military aggression of Ukraine impose heavy burdens on the provision and affordability of travel and hospitality services.
13. POINTS OUT that limitations on travel have serious effects on the operations and prices of passenger transport across all Member States, including, but not limited to, flights and cruises.

Future vision

14. STRESSES that the tourism ecosystem is subject to unprecedented conditions that are evolving quickly and affecting its traditional business models.
15. EMPHASISES the need to bring more transparency into relations between hosts, online platforms and public bodies, to make available reliable data on short-term accommodation rentals; UNDERLINES the importance of data collection and sharing in the short-term rental segment, which helps to facilitate a balanced tourism ecosystem[; in this context, TAKES NOTE of the Commission proposal on a common EU regulatory framework for short-term accommodation rentals].
16. UNDERLINES that the digital and green transitions in the tourism ecosystem, whilst respecting the principles of subsidiarity and proportionality, must be based on collaboration between stakeholders across sectors and public and private actors at EU, national, regional and local levels.
17. TAKES INTO ACCOUNT that the COVID-19 pandemic and the energy crisis have increased recognition of sustainability objectives both among EU citizens and globally, and INVITES the Commission, Member States and tourism stakeholders to capitalise on the willingness of many Europeans to change their travel and tourism habits so as to become more sustainable and responsible.

18. POINTS OUT that many businesses have proven able to adjust and innovate quickly with respect to their services and products, resources and target markets in exceptional circumstances; CONSIDERS that further increased labour skills and business flexibility can be instruments for a more resilient and sustainable tourism ecosystem.
19. POINTS OUT that domestic, cross-border and intra-EU tourism is important to build resilience for destinations, businesses and services.
20. INVITES Member States to:
 - a) exchange knowledge and best practices for developing and implementing tourism strategies at various governance levels, taking account of the economic, environmental, cultural and social sustainability of tourism and including the perspectives of visitors as well as local residents, organise awareness-raising activities on such themes as the benefits of the green and digital transformation, demand for sustainable offers, new skills needs and experimenting in tourism, and provide for the protection of local culture, including tangible and intangible cultural heritage;
 - b) help to build resilience in the tourism ecosystem across sectors and different public and private actors;
 - c) contribute to the green transition of the tourism ecosystem regarding:
 - i. transport, e.g. by supporting the decarbonisation of mobility, through innovations, new and breakthrough technologies, the development of multimodal travel and by increasing the attractiveness of sustainable modes of transport for passengers, with particular attention to the needs of the peripheries, less accessible areas, islands and outermost regions; and by promoting active mobility modes, such as cycling and hiking, and encouraging longer stays;

- ii. more circular and sustainable operations by tourism establishments across the ecosystem, including attractions, hospitality services, travel agents and tour operators;
 - iii. the use of relevant green public procurement criteria in procuring tourism-related services, such as events, hospitality and travel;
 - iv. creating conditions and incentives to improve the circularity of tourism services in line with EU-wide and national targets for food waste and waste separation, including reduced use of single-use plastic;
 - v. supporting sustainable tourism with regard to water management, energy efficiency, sanitation capacity and the protection of biodiversity;
- d) facilitate the digital transition in tourism and support the tourism industry and sustainable management of destinations, in particular by:
- i. improving the availability of comprehensive online information on the tourism offer; on subjects including sustainability, accessibility and target audiences;
 - ii. in cooperation with the Commission, deploying efforts aimed at digitalising travel documents, in accordance with the competences of Member States, and, where applicable, feasible and justified, using digital tools, such as the existing EU Digital COVID Certificate framework⁸;
 - iii. supporting the capacities and digital skills of tourism SMEs to provide innovative tourism products, services and effective communication with their clients;
 - iv. providing the necessary data to the Commission on travel information, including for the Re-open EU platform;

⁸ Regulation (EU) 2021/953.

- e) support the development and implementation of innovations in the tourism sector, research and innovation (R&I) projects and multi-disciplinary efforts to develop models and transferable practices for sustainable tourism;
- f) work on improving the availability of statistics and interoperable data-sharing at all levels relevant to the tourism ecosystem;
- g) support the development of the quality of education and skills needed by the tourism workforce, while respecting the principle of subsidiarity, and striving for fairness, equality and social inclusion in tourism jobs, paying attention to, in particular, the attractiveness of quality employment in the tourism sector and the particular needs of seasonal workers;
- h) promote the accessibility of tourism services to all groups with specific needs;
- i) in their policies, take into account, with regard to solidarity and responsible tourism, the impact of tourism on the quality of life of local communities;
- j) foster the transition in the tourism ecosystem, by various means of support that comprises, among others, the smart use of EU financial means provided for in the existing programmes and plans adopted within the limits of the EU budget in force, in line with national tourism strategies and the European Agenda for Tourism 2030;
- k) engage in the implementation of the European Tourism Agenda 2030 as set out in these conclusions.

21. INVITES the Commission to:

- a) engage, together with Member States, destinations and other tourism stakeholders, in implementing the European Agenda for Tourism 2030, in particular through:
 - i. the co-implementation process within the Transition Pathway for Tourism;

- ii. the promotion of cross-sectoral cooperation across relevant EU policy domains (e.g. transport, regional policy, environment, consumer protection, culture and, where relevant, health) to create a coherent and favourable policy environment for tourism;
 - iii. the development and promotion, in cooperation with all relevant national and local stakeholders, of governance models for sustainable and diversified management of destinations through the facilitation of exchanges of knowledge and best practices; and
 - iv. the establishment of platforms for studies, knowledge development, the collection and exchange of best practices, to provide information on existing communities, networks, ongoing projects and their results, topical events, training and funding opportunities, etc.;
- b) provide user-friendly and regularly updated travel information in exceptional situations, including through the Re-open EU platform;
 - c) review the passenger rights and package travel regulatory framework, to ensure its resilience to extensive travel disruptions, and also consider the risks of a liquidity crisis;
 - d) implement and, where applicable, further develop the EU Tourism Dashboard to support the monitoring of environmental, digital and socio-economic aspects of tourism;
 - e) support dialogue and cooperation between public authorities and private EU tourism stakeholders at all levels;
 - f) support SME digitalisation by collecting and sharing best practices on digital tools and practices for tourism;

- g) identify relevant financing opportunities for Member States and stakeholders through the existing EU budget and other sources to work towards the objectives recognised in this Agenda, through the regular updating of the ‘Guide on EU funding for tourism’ and other means;
- h) support awareness-raising activities for citizens and tourism stakeholders on the benefits of the green and digital transformation, consumer demand for sustainable offers, the development of new skills, innovative pilot projects in tourism and design and test the use of environmental footprint methodologies for the tourism ecosystem;
- i) support capacity-building programmes and various means of assistance for SMEs to engage in environmentally friendly practices and schemes;
- j) cooperate with Member States to ensure that consolidated tourism statistics data are provided, which include elements and indicators relating to economic, social, cultural and environmental sustainability, in cooperation with European Statistical System actors;
- k) support Member States and tourism stakeholders in implementing interoperable data-sharing practices;
- l) support Member States and relevant stakeholders in tourism with its expertise and experience and follow up on the actions supporting the European Agenda for Tourism 2030 in the framework of the Transition Pathway for Tourism through annual feedback from Member State experts in the Tourism Advisory Committee (TAC);
- m) follow up on the implementation of the European Tourism Agenda 2030 and report to the Council at least every three years.

22. INVITES tourism stakeholders to:

- a) engage in the implementation of this European Tourism Agenda 2030, in cooperation with the Commission and the Member States, raising awareness to their partners and customers and contribute with their expertise and experience to the co-implementation of the tourism transition while disseminating the knowledge and outcomes achieved;
 - b) where relevant, commit with concrete pledges, on a voluntary basis, to the implementation of the Tourism Transition Pathway actions as their support for the Multi-annual EU Work Plan of the European Agenda for Tourism 2030 as presented in the Annex.
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Annex: Multi-annual EU Work Plan of the European Agenda for Tourism 2030

This Multi-annual EU Work Plan of the European Agenda for Tourism 2030 describes voluntary concrete actions for the Member States, relevant public authorities, the Commission, and other stakeholders in the tourism ecosystem to take and encourage, in accordance with the principle of subsidiarity and within the remit of their competencies. The proposed actions and outputs provide strategic guidance for following the progress of the Agenda in five priority areas. Unless otherwise specified, the target date for the outputs follows the scope and timeline of the European Agenda for Tourism 2030.

Priority area: Enabling policy framework and governance

Key topic	Goals and objectives	Actions and responsibilities	Output / target date
Fair measures for short-term rentals (STR)	A transparent EU STR market, promoting competition and consumer protection, creating opportunities and contributing to sustainable tourism.	Member States and the Commission to strengthen the EU framework for short-term rentals to enhance transparency, make it fairer and improve market access. Member States to support regional and local authorities.	EU-level common framework for short-term.
Statistics and indicators for tourism	Improving the availability and coverage of tourism statistics to consider the economic, social, cultural and environmental impacts of tourism. Improving access to private and destination-level data for producing official statistics on tourism, respecting data protection rules and legitimate commercial interests.	European Statistical System actors to revise harmonised data collection rules on tourism statistics. Tourism industry, regional and local authorities and destination management organisations (DMOs) to consider developing data collection and sharing mechanisms that can also benefit official tourism statistics aggregation. The Commission to implement the EU Tourism Dashboard to support the following-up of environmental, digital and socio-economic aspects of tourism.	Revised EU framework for tourism statistics which includes indicators on the economic, environmental and social impacts of tourism by 2030. EU Tourism Dashboard publicly offering indicators on the green and digital transition and socio-economic resilience at national, regional and local levels.

Comprehensive tourism strategies development or update	Strategic approach to tourism at national, regional and local levels to consider the economic, environmental, cultural and social sustainability of tourism.	The Commission and Member States to facilitate sharing of knowledge and best practices.	Best practice exchange. Member States or their key tourism regions to have examples of comprehensive tourism strategies by 2025.
Collaborative and data-based destination management	Expanding the scope of tourism destination management organisations to collaborative and data-based decision-making involving all stakeholders, including local residents.	The Commission to provide awards for smart and sustainable destination management. The Commission and Member States to support destinations in developing their local governance models.	Destination awards. Study by the Commission on DMO governance models in the EU; community of practice and toolbox for destination management by 2023.

Priority area: Green transition

Key topic	Goals and objectives	Actions and responsibilities	Output / target date
Improving circularity of tourism services	Reducing the environmental footprint of tourism services (food/general waste, water/energy efficiency and pollution).	The Commission and Member States to provide support to tourism services to reduce their environmental footprint in line with the EU objectives and support the improvement of waste and water management and sanitation capacity.	Tourism/hospitality organisations to have reduced waste in line with the Waste Directive 91/271/EEC.
Supporting the green transition of tourism companies and SMEs	Encouraging tourism companies to take up greener practices by increasing demand for green services by public actors and promoting schemes which support the assessment, tracking and reduction of environmental footprint. Providing support for SMEs to engage in environmentally friendly practices to ensure that it does not become a barrier to trade.	The Commission and Member States to use relevant green public procurement (GPP) criteria where applicable when procuring tourism-related services (events, hospitality, travel). The Commission, Member States and other relevant levels of public authorities to provide support to SMEs to engage in environmentally friendly practices and schemes, such as EMAS, EU Ecolabel, other EN ISO 14024 type I ecolabels or equivalent third-party verified voluntary labels.	Increased use of relevant GPP criteria in purchasing tourism ecosystem services; increased number of EMAS-registered tourism organisations; increased number of EU Ecolabel tourism services or accommodation awarded with other EN ISO 14024 type I ecolabels or equivalent voluntary labels.
Research and innovation projects and pilots on circular and sustainable tourism	Supporting public-private co-operation on research and innovation projects and pilots which develop models and transferable practices for sustainable tourism.	The Commission and Member States to support the development of models and transferable practices for sustainable tourism; DMOs and relevant levels of public authorities to support establishing large-scale pilots on sustainable tourism across the EU, including on islands and in outermost regions.	Validated and transferable circular and sustainable tourism models; best practices on destination pilots with holistic circular models.

Priority area: Digital transition

Key topic	Goals and objectives	Actions and responsibilities	Output / target date
Digitalisation of tourism SMEs	Effective use of digital tools by tourism SMEs and microenterprises for resource management, internal work processes, service provision, marketing, communication with clients and supply chains and new service development.	The Commission, Member States, other relevant public authorities and DMOs to raise awareness among tourism SMEs of the benefits of digitalisation and to support tourism SMEs and start-ups through digitalisation programmes; the Commission to collect and share best practices on digital tools and practices for tourism.	Tourism SMEs to have reached a basic level of digital intensity by 2030 in line with the Digital Compass objectives; searchable collection on transferable digital tools and practices for tourism published by the Commission by 2023; European Enterprise Network advisory services to support tourism SMEs.
Public data sharing for encouraging innovative tourism services	Encouraging and participating in tourism-relevant data sharing to support innovative services.	National, regional and local authorities and DMOs to publish open datasets of relevance for tourism services - data on public transport, museum collections and visitors, etc.	Examples of open public datasets in significant tourism regions by 2025, which can be used in developing tourism-related services.
Research and innovation projects and pilots on digital tools and services in tourism	Supporting public-private cooperation on research and innovation projects and pilots that develop the innovative and sustainable use of digital tools and practices in tourism.	The Commission, Member States and other relevant public authorities to support data-driven sustainable destination management development. The Commission and Member States to support innovative tourism services using advanced technologies (virtual/augmented reality, AI) and digital and digitised cultural heritage.	Best practices to monitor carrying capacity and well-being of local residents by 2025; examples of innovative services and partnerships to provide tourism experiences through virtual, extended and augmented reality, big data and AI by 2025.

Priority area: Resilience and inclusion

Key topic	Goals and objectives	Actions and responsibilities	Output / target date
Accessibility of tourism services	Enhancing social and economic inclusion, taking into account the elderly, persons with disabilities and other groups with specific needs.	The Commission, Member States other relevant public authorities and DMOs to raise awareness of the importance of accessibility in tourism with a view to improving the accessibility of, and creating favourable conditions for, accessible tourism services.	Increased offer of accessible tourism services.
Resilient EU tourism services and destinations	Improving the resilience of EU tourism services and destinations to service diverse audiences in all seasons and various locations.	The Commission and Member States and other relevant public authorities to provide various forms of support to help destinations, companies and start-ups diversify tourism services, particularly across seasons and various locations.	More resilient services and destinations, which can better resist shocks.
Sustainable innovation in tourism services	Promoting the EU as a destination that meets the changing demands of tourism while maintaining the well-being of residents and their environment.	The Commission and Member States and other relevant public authorities to provide various forms of support to help companies, start-ups and local communities innovate with sustainable and resilient tourism services, with a positive net impact for residents and local ways of life.	Innovative tourism services to meet new types of tourism demand while respecting the long-term sustainability needs of residents and the environment.

Priority area: Skills and support for transition

Key topic	Goals and objectives	Actions and responsibilities	Output / target date
Awareness-raising on needs and opportunities for the twin transition in tourism	Awareness-raising on changes in tourism demand, the opportunities offered by the twin transition for tourism actors, as well as skills and approaches that help to increase resilience.	The Commission, Member States and other relevant public authorities and DMOs to organise awareness-raising activities for tourism stakeholders and support networking and best-practice sharing by award-winning cities in the EU on smart tourism, culture and heritage, sustainability, innovation, and accessibility.	Dissemination of tourism transition pathway in 2022; awareness-raising on digital and green transition as well as resilience, best-practice exchange and promotion of events.
Pact for skills in tourism	To meet skills demand in the tourism ecosystem by implementing and expanding participation in the Pact for skills in tourism in order to actively encourage skills development and provide training opportunities for the workforce, the unemployed and SMEs.	The Commission, Member States and other relevant public authorities to facilitate and support the establishing of national, regional and local skills partnerships where feasible and in accordance with the existing framework; the Commission to facilitate engaging tourism companies, education providers, trade unions and other organisations to commit to jointly agreed training targets for their workforces, in compliance with the principle of subsidiarity; Member States to support skills partnerships to establish fast-track training courses, apprenticeship schemes and blended models for the unemployed and jobseekers.	Regional and local skills partnerships to be established in significant tourism regions by 2024. By 2030, a significant part of the tourism workforce to have participated in training in line with the targets of the Pact for skills in tourism.
Integrated support platform for tourism stakeholders	Helping tourism stakeholders find relevant and timely information, funding and support and connections to peers and experts.	The Commission to establish a stakeholder support platform to facilitate information-sharing, accessing resources and collaboration across tourism sectors and between actors. Member States, and other relevant public authorities and DMOs to inform their stakeholders and share relevant information on their results, events and resources for European audiences through the platform and other information channels.	Stakeholder support platform to be launched by 2023 with regular information-sharing, collaboratively developed content and community activities.