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**NOTE**

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From: Permanent Representatives Committee (Part 1)  
To: Council

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Subject: Conclusions on building a sustainable and competitive tourism for the future  
- *Approval*

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**DRAFT COUNCIL CONCLUSIONS ON**

**“Building a sustainable and competitive tourism for the future”**

THE COUNCIL OF THE EUROPEAN UNION,

1. HAVING REGARD to Articles 6 and 195 of the Treaty on the Functioning of the European Union, as regards the European Union supporting, coordinating and supplementing the action taken by 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 of 1 December 2022 on the European Agenda for Tourism 2030<sup>1</sup> (hereafter ‘the Agenda’), the Transition Pathway for Tourism<sup>2</sup>, and the ‘Palma Declaration’.
3. RECOGNISING the three-dimensional nature of sustainability, i.e. economic, social and environmental, which must form an integral part of tourism policies.
4. RECOGNISES the economic contribution of tourism in the EU which in 2024 represented around 7 % of its Gross Value Added, while tourism accounted for 10 % of its jobs and 4.6 million businesses<sup>3</sup>, of which 99 % are small and medium-sized enterprises (SMEs)<sup>4</sup>, as well as the tourism sector’s contribution to the overall competitiveness of the Union, noting that in some regions, tourism constitutes a structural pillar of the economy.

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<sup>1</sup> 15441/22.

<sup>2</sup> [Transition Pathway for Tourism](#).

<sup>3</sup> Industrial Ecosystems Report.

<sup>4</sup> European Commission, DG GROW, [Industrial Ecosystems Indicators Dashboard](#) (2023).

5. RECOGNISES the cross-sectoral nature of tourism and the importance of effective multi-level governance in the Union, involving the Commission, Member States and, where appropriate, regional and local authorities, destination management organisations (DMOs), the tourism industry and other relevant actors, such as professional associations, in order to facilitate cooperation and the exchange of good practices, and enhance coordination across relevant policy areas and sectors, while building on existing frameworks and instruments and avoiding unnecessary duplication.
6. WELCOMES the Report from the Commission to the Council on the Implementation of the Agenda of 16 December 2025<sup>5</sup> (hereafter ‘the Report’), NOTES that according to the Report, implementation gaps persist across Member States and in its five priority areas, including multi-level governance, and RECOGNISES the need for increased and coherent efforts for addressing those gaps.
7. STRESSES that the delivery of a sustainable, competitive and resilient tourism ecosystem requires enabling tourism enterprises, especially SMEs, destinations and other relevant actors, to mobilise and best utilise the relevant EU tools and instruments, including through simplified and improved access to available EU funding and financing, technical assistance and advisory support, as well as structured capacity-building, peer-learning and exchange of good practices.
8. RECOGNISES that geopolitical tensions, economic uncertainty, exacerbated impacts of climate change, overuse and scarcity of natural resources, unbalanced tourism, rapid technological developments, and persistent workforce shortages affect the sector and local communities in destinations, including sudden disruptions to connectivity and shifts in demand and mobility.

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<sup>5</sup> 17007/25.

9. **UNDERLINES** that tourism is a key driver of sustainable growth, employment, social cohesion and cultural exchange in the Union, including in rural, coastal, mountainous, outermost and less-visited regions, and that its development must safeguard the well-being of residents and local communities, preserve natural and cultural heritage and contribute to the Union's objectives in terms of climate neutrality, climate change adaptation, the circular economy, digital transformation, long-term economic sustainability, resilience and competitiveness.
10. **HIGHLIGHTS** the importance of year-round connectivity ensured by complementarity of different modes of transport for the tourism ecosystem.
11. **STRESSES** that the sustainability and competitiveness of the Union's tourism ecosystem are mutually reinforcing and complementary, as sustainability-oriented investments, production and consumption practices and initiatives – including resource efficiency, circularity, decarbonisation, nature and biodiversity conservation, water resilience, climate resilience – can ultimately reduce costs and risks, enhance productivity and quality, strengthen destination attractiveness, resident and tourist experience, and improve resilience, while a competitive tourism sector is essential in order to deliver and sustain the investment capacity and innovation needed to implement the green and digital transitions.
12. **RECALLS** that tourism is intrinsically linked to the well functioning of the Single Market and **STRESSES** that smooth, secure and reliable cross-border travel and the avoidance of unjustified fragmentation of value and supply chains, support a level playing field for tourism actors and enhance the sustainability and competitiveness of the Union's tourism ecosystem.

13. UNDERLINES, as a horizontal principle, the importance of reducing existing and avoiding introducing new unnecessary administrative burden, STRESSES the Union's overarching objective of simplifying EU legislation to enhance and support competitiveness and streamline processes for enterprises, while safeguarding economic, social, and environmental goals.
14. CALLS on the Commission to ensure that, in the preparation of new initiatives, coherence with existing legislative acts is met by avoiding unnecessary overlaps, and that proposals are underpinned by appropriate impact assessments in accordance with the principles of better regulation, and taking into account the particularities and fragmented structure of the tourism ecosystem, and the potential burden on SMEs.

### **Local Communities and Social Equity**

15. ACKNOWLEDGES the growing challenge of unbalanced tourism, understood as both 'overtourism' and 'undertourism', marked by spatial and seasonal concentration of tourist flows and investment, with pressure on specific destinations and missed opportunities elsewhere, and UNDERLINES the need for further attention to be paid to peripheral, rural, island, mountainous and remote destinations, in order to strengthen regional balance and unlock their tourism potential.
16. STRESSES the importance of the Cohesion Policy to support sustainable and balanced tourism development, as well as destination resilience, in line with territorial strategies.
17. ENCOURAGES Member States to:
  - a) deepen their understanding of balanced tourism, by:
    - i. systematically collecting, analysing and using data on spatial and seasonal concentration of tourist flows, development and tourism-related pressures, challenges and spread of benefits at destination level;
    - ii. improving tourism data correlation with housing pressures, labour markets dynamics, environmental impacts and quality of life of residents;

- b) where appropriate, develop and implement national and regional policies for balanced tourism which:
  - i. promote spatial and temporal redistribution of tourist flows in a sustainable manner, including towards rural, mountainous, island, remote and outermost regions, and less-visited urban areas, as well as ensuring collaboration among all relevant actors;
  - ii. support the diversification of tourism products, further enhancing the resilience of local tourism value and supply chains;
- c) strengthen community involvement and social equity by:
  - i. ensuring meaningful participation of residents, local communities, micro-enterprises and SMEs, tourism workforce and associations, in the design, implementation and monitoring of tourism strategies, using appropriate methodology tools, such as analyses, surveys and consultations;
  - ii. promoting responsible, accessible and inclusive tourism models, including with improved access for persons with disabilities, that spread benefits fairly, respect local cultures and reduce negative externalities for residents;
  - iii. making use of the results of Eurobarometer and other comparable surveys to monitor citizens' perceptions, social acceptance of tourism and quality of life in destinations.

18. INVITES the Commission to:

- a) develop, in cooperation with Member States, guidelines for addressing unbalanced tourism, building on the existing and ongoing work of EU institutions, EU expert groups and Member States on resilience and social sustainability;
- b) explore possibilities that could facilitate residents' access to sports, cultural and other recreational services offered in destinations.

- c) publish on the EU Tourism Platform and on the EU Tourism Dashboard statistical data gathered under the Tourism Statistics Regulation, statistical surveys, and other innovative sources, and share best practices on measuring balanced tourism.

## **Connectivity and Sustainable Mobility**

- 19. RECOGNISES that reliable, affordable, accessible, frequent and year-round air, land and waterborne links are a key enabler for balanced tourism development, territorial cohesion and citizens' mobility, in particular for island Member States, insular and outermost regions – where accessibility and economic activity are predominantly reliant on air transport –, and also rural, mountainous and remote regions.
- 20. STRESSES the importance of widely available sustainable and multimodal mobility solutions, and of reducing barriers to free movement, which will contribute to the reduction of transport's environmental impacts and to a seamless travel experience for tourists and residents, respectively, and RECALLS the relevance of the Commission's Communication on high-speed rail<sup>6</sup>, for advancing sustainable and connected rail mobility across the Union.
- 21. HIGHLIGHTS the significance of accessibility of transportation modes for all passengers, including those with reduced mobility and disabilities, as a key element of inclusive tourism.
- 22. ENCOURAGES Member States to:
  - a) implement local, regional, national, and cross-border transport solutions for balanced tourism which integrate sustainable mobility and infrastructure options that improve access to lesser-known destinations and address seasonality, in synergy with EU transport and connectivity policies, with particular attention to islands, rural, mountainous, outermost, and remote regions;

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<sup>6</sup> [COM \(2025\) 903 final 'Connecting Europe through High-Speed Rail'](#).

- b) promote sustainable, multimodal and cross-border connectivity links for tourism, including rail, buses, ferries and other forms of public transport, as well as cycling, including last-mile solutions within destinations, including towards remote rural areas;
- c) facilitate the development of connectivity-related infrastructure (such as recharging infrastructure) and services that jointly benefit local communities and tourist flows, including accessible, interoperable and, where relevant, cross-border compatible digital services, supporting seamless journeys;
- d) collect and use data and indicators on tourism mobility patterns and, as part of national and regional tourism monitoring approaches;
- e) undertake regional and thematic cooperation on the facilitation of cross-border travel, including to neighbouring and third countries.

23. INVITES the Commission to:

- a) integrate the tourism-related connectivity and accessibility needs of Member States, including the structural dependence on air connectivity and specific constraints of island Member States, insular, peripheral, outermost and remote regions, in EU transport policies and planning, in order to support territorial cohesion and balanced destination development;
- b) improve seamless multimodal travel, between destinations, information and services, and integrated ticketing solutions, including through interoperability and standardisation efforts, and by facilitating access to on-demand mobility services;
- c) facilitate the exchange of good practices and cooperation among local, regional and national authorities aimed at improving the overall mobility experience of tourists at destination.

## Green Transition and Climate Change

24. RECOGNISES that the tourism ecosystem is increasingly exposed to climate change and environmental degradation, posing systemic risks to economic and social sustainability and that the ecosystem may be adversely affected by extreme weather events, water stress, biodiversity loss and pollution.
25. STRESSES that accelerating mitigation and adaptation action, protecting biodiversity and restoring natural ecosystems, in line with the Union's climate and environmental objectives, are indispensable to safeguarding the long-term resilience, attractiveness and competitiveness of destinations and tourism enterprises, including through further attention on a shift towards more regenerative tourism approaches that benefit nature and destinations.
26. INVITES Member States to:
- a) accelerate the green transition of tourism in line with the European Green Deal, climate objectives and circular economy policies by:
    - i. encouraging tourism enterprises to adopt resource-efficient, low-carbon and circular business models;
    - ii. promoting the uptake of integrated tools and verified environmental management schemes, such as EU Ecolabel and EMAS, as well as recognised national schemes, by tourism providers and destinations;
  - b) strengthen climate change mitigation and adaptation in tourism policies that best contribute to economic, social and environmental sustainability, by:
    - i. managing tourist flows and promoting tourism products and nature-based solutions that are more resilient to the impacts of climate change;
    - ii. considering integrating climate change concerns into tourism strategies, and where relevant, in investment planning;

- iii. addressing infrastructure adaptation needs, coastal and maritime protection, and transport, in particular in areas highly exposed to climate change-related risks, in coherence with local climate projections;
- c) identify appropriate measures to scale up the green transition of destinations and enterprises.

27. INVITES the Commission to:

- a) continue supporting research and innovation (R&I) projects and large-scale pilots on circular and sustainable tourism, notably through the activities supporting climate and environmental actions, such as the current LIFE programme, and promote the replication of validated models through the Circular Cities and Regions Initiative and other relevant existing instruments;
- b) support the efforts of Member States and tourism enterprises in reducing their environmental footprint, ensure that the tourism ecosystem forms part of the new EU integrated framework for European Climate Resilience and Risk Management<sup>7</sup>, and develop knowledge and guidance to help destinations and enterprises address climate change;
- c) work on climate forecasting related to tourism, including the analysis of long-term projections, by leveraging existing tools such as the Copernicus Climate Change Service<sup>8</sup>, to assess risks and opportunities, and to foster exchange between Member States with similar challenges, especially with regards to climate change mitigation and adaptation policies;
- d) prepare and regularly update a list of sustainability certifications and labels which are recognised at EU or national level.

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<sup>7</sup> European Climate Resilience and Risk Management – Integrated Framework – Climate Action

<sup>8</sup> [Copernicus Climate Change](#)

## Digital Transformation, Data and Innovation

28. RECOGNISES that a robust European framework for tourism data and strategic planning integration, including a common interoperable data ecosystem, guidance on artificial intelligence, data-driven destination management, advanced data tools and innovative travel-tech services, are strategic levers for better planning, competitiveness, sustainability and resilience of tourism.
29. ENCOURAGES Member States to:
- a) foster the effective use of available digital tools by tourism enterprises and public authorities responsible for destination management, in line with the Digital Decade targets<sup>9</sup>;
  - b) systematically collect high quality real-time data, using existing digital platforms, where relevant, including data made available under the EU short-term rental data framework, analyse and use data on strategic planning, spatial and seasonal management of tourists flows, investment, and tourism-related benefits and pressures;
  - c) promote innovative and inclusive tourism services and data-driven destination management approaches, for relevant actors from both the public and private sectors, while respecting fundamental rights, privacy and data protection.
30. INVITES the Commission, in cooperation with Eurostat and national statistical authorities, to review and improve coverage of comparable tourism statistics from basic statistics on trips and overnight stays to data on the economic, social and environmental impacts of tourism, harnessing digital technologies and advanced analytics to improve the quality and timeliness of tourism data, while preventing unnecessary administrative burden.

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<sup>9</sup> [Digital Decade Policy Programme 2030](#)

31. INVITES the Commission, in cooperation with Member States, to:
- a) accelerate the deployment of the common European Tourism Data Space (ETDS), including:
    - i. the development of standards for data interoperability and governance to underpin evidence-based planning, monitoring and comparability across Member States and other sectorial data spaces;
    - ii. the further development of the EU Tourism Dashboard, the consolidation and promotion of the EU Tourism Platform as an integrated support platform, and the development of suitable governance options and cooperation mechanisms, such as a European Digital Infrastructure Consortium;
    - iii. the provision of interoperable ETDS tools, technical support and incentives for data owners, to ensure both technical and operational digital capacity of enterprises, DMOs, local authorities and other relevant actors, and to secure a critical mass of data providers and users across the tourism ecosystem;
  - b) strengthen a competitive and innovative tourism ecosystem in the digital field by:
    - i. promoting networking between incubators, accelerators and relevant innovation hubs;
    - ii. enabling a level playing field, including via effective implementation of relevant EU digital rules, where applicable, while addressing dependencies on non-EU travel-tech solutions, including by promoting European alternatives, open standards and data portability, as well as user control over data;
    - iii. ensuring that SMEs, start-ups, scale-ups, and where relevant, DMOs and public authorities, can access EU funding, cascade funding and advisory services for digital investments, as well as fostering cross-border synergies between relevant stakeholders working on digitalisation.

32. INVITES the Commission, in cooperation with industry and other stakeholders, to:
- a) continue supporting R&I projects, testbeds and pilots on digital tools and services in tourism, including those that strengthen smart destinations, improve accessibility, support innovation and enhance resilience;
  - b) support an industry-led initiative to develop guidelines on the responsible and proficient use of AI in tourism, in line with the Apply AI Strategy<sup>10</sup>, consistent with EU legislation and strategies, acknowledging relevant existing workstreams.

### **Skills and Quality Employment**

33. STRESSES that quality employment, adequate working conditions and skills development, in line with the European Education Area<sup>11</sup>, the Union of Skills<sup>12</sup> and the Quality Jobs Roadmap<sup>13</sup>, including through the EU Pact for Skills initiative and national and regional skills partnerships, are essential for the long-term competitiveness and resilience of the tourism sector; RECOGNISES that the aforementioned are critical for addressing structural workforce and skills shortages, including in the context of demographic changes, and analysing seasonal and spatial employment patterns, and are particularly relevant in hospitality and tourism services, and in making tourism careers more attractive and fostering worker retention.
34. ENCOURAGES Member States, in accordance with their competences, to:
- a) promote lifelong learning, upskilling and reskilling for tourism workers and job-seekers, with a particular focus on green, digital, entrepreneurial as well as social and intercultural competences, and provide enhanced visibility and outreach to maximise their impact and uptake;

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<sup>10</sup> [Apply AI Strategy](#)

<sup>11</sup> [European Education Area](#)

<sup>12</sup> COM (2025) 90 final.

<sup>13</sup> COM (2025) 944 final.

- b) expand national and regional skills partnerships in tourism regions and strengthen the role of DMOs, regional, local authorities and other relevant actors as skills multipliers;
- c) strengthen national and regional skills intelligence and forecasting tools, including by contributing relevant employment and skills-related data to the ETDS;
- d) exchange good practices on seasonality management, career pathways, and worker retention, by improving the availability of comparable information on skills and workforce needs, and job quality.

35. INVITES the Commission to:

- a) continue its work on the EU Pact for Skills initiative, including the large-scale skills partnership for tourism and other related programmes for upskilling and reskilling;
- b) support the development of comparable EU-level advanced integrated skills intelligence and forecasting tools for tourism, including through coordination, methodological guidance and the effective use of the ETDS;
- c) continue supporting tourism-related projects under EU programmes, and other instruments supporting skills and labour mobility in tourism;
- d) in cooperation with Member States, further explore and promote the use of the European Employment Services (EURES) network, to improve EU-wide matching services, including for addressing seasonal demand and gaps in employment.

### **Resilience, Adaptive Management and Crisis Preparedness**

36. Without prejudice to existing instruments, EMPHASISES the need to strengthen crisis preparedness and response across the tourism ecosystem by:

- a) developing structured risk assessment and prevention, contingency planning and early-warning systems at local, regional, national and EU levels, building on existing EU projects<sup>14</sup>;

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<sup>14</sup> Crisis Management and Governance in Tourism - European Innovation Council and SMEs Executive Agency (EISMEA).

- b) improving crisis communication, including accessible information in multiple languages and formats, taking into account the needs of vulnerable travellers;
- c) integrating crisis management, climate adaptation, safe and secure travel considerations and disaster risk reduction in tourism strategies and smart destination frameworks.

37. ENCOURAGES adaptive management of tourism by:

- a) using real-time data and monitoring systems to manage tourist and day visitor flows, and adjust measures in a targeted and proportionate manner;
- b) promoting the diversification of tourism products such as slow and nature tourism, cultural tourism, business travel and MICE, enhancement of market segmentation and extension of the tourist season, to reduce vulnerability and exposure to shocks and unbalanced tourism;
- c) fostering cross-sector cooperation with other policy areas, such as transport, environment, culture, digital and health, in order to manage uncertainty and external shocks.

38. INVITES the Commission, in close cooperation with Member States to:

- a) support destinations, in particular DMOs, in building resilience and social sustainability, including through EU-funded projects and initiatives that generate replicable best practices, with a focus on local communities and the environment;
- b) ensure that crisis preparedness, risk prevention and climate adaptation receive reinforced attention and support;
- c) facilitate better coordination among Member States, and with relevant stakeholders, to enhance preparedness and response, including, if appropriate, through ad hoc coordination arrangements, taking into account the specificities of the tourism ecosystem.
- d) when necessary, take actions and adopt proposals to mitigate the negative consequences of crises, which have a significant impact on Europe's tourism ecosystem.

## Multi-Level Governance

39. RECOGNISES the importance of strong multi-level and multi-stakeholder governance, involving all relevant policy areas, and respective stakeholders such as DMOs, associations, local communities, enterprises, and other relevant actors.
40. UNDERLINES the importance of, where appropriate, cooperation with relevant international partners and organisations, in order to enhance coherence, resilience and global competitiveness of Europe's tourism ecosystem.
41. ACKNOWLEDGES the need to explore possible means to further strengthen governance for crisis preparedness and climate adaptation and resilience, while avoiding duplication through the consolidation and alignment of existing governance frameworks, including, where relevant, those supporting monitoring and reporting of progress towards the relevant goals of the 2030 Agenda for Sustainable Development.
42. EMPHASISES the need to enhance the visibility of Europe as a destination of destinations, by fostering Europe's image as a safe, sustainable, and inclusive travel destination, recognising safety and security as key to tourist confidence, while fully respecting the autonomy of national and regional brands, ensuring equitable visibility of diverse destinations.
43. ENCOURAGES Member States to:
  - a) strengthen coordination between tourism and related policy areas such as transport, environment, regional development, digital, innovation, skills, education, labour market, culture and sport, by reflecting the tourism perspective in relevant policy initiatives;

- b) strengthen the transnational dimension of tourism through cross-border, thematic or regional cooperation, including the development of clusters and, where appropriate, coordinate approaches in relevant international tourism fora;
- c) strengthen structured dialogue between national, regional and local authorities, DMOs and other relevant actors, to improve data collection, indicators, including, where appropriate, SDG-aligned indicator frameworks and reporting tools, strategy alignment and the implementation of sustainable tourism policies.

44. INVITES the Commission to:

- a) promote cross-sectoral cooperation across other relevant EU policy areas such as transport, cohesion and regional policy, environment, housing, consumer protection, culture, and sport, by reflecting the tourism perspective in relevant policy initiatives, streamlining of procedures, to create a coherent, conducive-to-investments and favourable policy environment for tourism;
- b) strengthen the international dimension of the EU tourism ecosystem, as an element of the Union's external action and economic diplomacy, including by:
  - i. enhancing cooperation and structured exchanges with partner countries and regions of relevance for tourism and connectivity;
  - ii. engaging, as appropriate, in relevant international organisations and fora and their analytical and standard-setting work, including the UN, UN Tourism, the OECD, and relevant G7/G20 tracks;
  - iii. supporting international cooperation on the exchange of good practice and comparability of tourism data and indicators, where appropriate, in coordination with Member States.
- c) incorporate into the EU Tourism Platform, a user-friendly one-stop-shop, to provide available information for the tourism ecosystem, as well as relevant support and funding opportunities;

- d) facilitate coherent EU-level tourism narratives and outreach, in a complementary manner to national and regional branding autonomy and diversity, and promotional competences, by:
- i. modernising the ‘Destination Europe’ narrative and branding framework, in close collaboration with Member States, while ensuring the full inclusion of island, outermost and less-visited regions;
  - ii. strengthening alignment between tourism narratives, sustainability objectives and broader EU policy priorities.

### **Monitoring and Follow-up**

45. INVITES the Commission, in cooperation with Member States and relevant stakeholders, to support and follow up on the implementation of these conclusions, which build upon the Council conclusions on the Agenda for Tourism 2030.
46. INVITES the Commission to monitor and present to the Council, every three years from the adoption of these conclusions, a consolidated report on their implementation, as well as the relevant actions in the Annex of the Council conclusions on the Agenda for Tourism 2030.
47. INVITES the Commission to take due account of these conclusions, and of the priorities and actions set out therein, in the preparation of the upcoming EU Sustainable Tourism Strategy.
48. INVITES tourism stakeholders to engage in the implementation of these conclusions, in cooperation with the Commission and the Member States, raising awareness to their partners and customers and contribute with their expertise and experience, and disseminating the knowledge and outcomes achieved.
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