



D3.4 RECOMMENDATIONS PAPER

FU-TOURISM

Future-Ready business support ecosystems for
Tourism SME transition to green and digital resilience.



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Abbreviations and terms used

Abbreviation/Term	Description / Definition
FU-TOURISM	EU project supporting the green and digital transition of tourism SMEs.
SME	Small and Medium-sized Enterprise

EC	European Commission
EU	European Union
EIB	European Investment Bank
BSO	Business Support Organisation
EESC	European Economic and Social Committee
CoR	Committee of the Regions
DMO	Destination Management Organization
SMP/COSME	Single Market Programme/COSME (Eu Funding programme)
OECD	Organisation for Economic Cooperation and Development
UN	United Nations
SAFE	Survey on the Access to Finance of Enterprises
AI	Artificial Intelligence
HOTREC	European Hospitality Association
LTTAP	Local Tourism Transition Action Plan
API	Application Programming Interface

Executive Summary

This paper sets out six policy recommendations to close the gap between what the EU has already agreed for the green and digital transition of tourism and what has actually reached SMEs and destinations. They draw on three sources: a review of the European tourism policy landscape, a consultation with stakeholders across the tourism ecosystem, and the practical evidence generated through FU-TOURISM's own Acceleration Programme, Living Labs and Stakeholder Workshop. Each recommendation names who should act, and by when.

The six recommendations are:

1 Consolidate green-financing instruments for tourism SMEs and bundle them with technical advisory services, not capital alone.

→ *European Commission and Member States (managing authorities for Cohesion Policy, Interreg and the COSME/SMP successor programme)*

2 Make SME adoption — not just technical deployment — the condition for funding any digital or smart-tourism platform.

→ *European Commission, national governments and Destination Management Organisations*

3 Replace one-off training with continuous reskilling mechanisms, linked explicitly to the sector's demographic renewal challenge.

→ *National and regional governments, together with Business Support Organisations and training providers*

4 Design blended-finance instruments that provide continuity of cash flow from pilot to scale, not just capital at the start.

→ *The European Union, Member States, and financial institutions and public guarantee bodies*

5 Recognise Business Support Organisations and Living Labs as permanent innovation infrastructure, not project-bound instruments.

→ *The European Commission and national/regional authorities*

6 Give destination-governance bodies real powers and broaden their success indicators beyond arrivals and overnight stays.

→ *Regional and local authorities, supported by Destination Management Organisations and the EU*

None of these recommendations depends on a single level of governance. Each names the actor(s) best placed to lead, and each is anchored to a concrete near-term window in the EU's own programming calendar — from the next generation of European funding programmes to the 2027 International Year of Sustainable and Resilient Tourism — so that progress can be checked rather than assumed.

Summary Matrix

The table below summarises the six recommendations: what is being asked, of whom, and by when. It is meant to be read on its own — the sections that follow set out the evidence behind each line.

Pillar	Headline recommendation	Lead actor(s)	Anchor / timeframe
2.1	Consolidate green-financing instruments for tourism SMEs and bundle them with technical advisory services, not capital alone.	European Commission and Member States (managing authorities for Cohesion Policy, Interreg and the COSME/SMP successor programme)	Ahead of the next COSME/SMP successor programme and the Transition Pathway for Tourism's 2027 review.
2.2	Make SME adoption — not just technical deployment — the condition for funding any digital or smart-tourism platform.	European Commission, national governments and Destination Management Organisations	From the next Digital Europe / COSME successor calls, aligned with the Digital Decade 2030 targets.
2.3	Replace one-off training with continuous reskilling mechanisms, linked explicitly to the sector's demographic renewal challenge.	National and regional governments, together with Business Support Organisations and training providers	Through the next Pact for Skills — Tourism Ecosystem Partnership renewal cycle.
2.4	Design blended-finance instruments that provide continuity of cash flow from pilot to scale, not just capital at the start.	The European Union, Member States, and financial institutions and public guarantee bodies	Ahead of the next Multiannual Financial Framework negotiations and as a direct follow-up to the EU Startup and Scaleup Strategy.
2.5	Recognise BSOs and Living Labs as permanent innovation infrastructure, not project-bound instruments.	The European Commission and national/regional authorities	Starting with FU-TOURISM's own Continuation Strategy (D3.3) as an immediate test case, and carried into the design of the next COSME successor programme.
2.6	Give destination-governance bodies real powers and broaden their success indicators beyond arrivals and overnight stays.	Regional and local authorities, supported by Destination Management Organisations and the EU	Ahead of the 2027 International Year of Sustainable and Resilient Tourism.

1. INTRODUCTION AND CONTEXT

Tourism is one of Europe's main economic and social drivers. It accounts for approximately 10% of employment and nearly 7%¹ of the European Union's gross value added, supported by more than 4.6 million businesses, 99% of which are small and medium-sized enterprises (SMEs). Beyond its economic contribution, tourism plays a vital role in promoting territorial cohesion, the preservation of cultural heritage, stimulating local economies, and strengthening Europe's international profile. However, the sector is currently undergoing one of the most profound transformations of recent decades.

Following the post-pandemic recovery, European tourism has demonstrated remarkable growth, but it has also exposed the limitations of a model, which measures success primarily in terms of increasing visitor arrivals and overnight stays. The concentration of visitors in certain destinations, growing pressure on housing and local services, the need to redistribute tourism flows, the acceleration of the digital transition, the emergence of artificial intelligence, and increasing exposure to climate, health, and geopolitical risks all highlight that the future of European tourism will depend less on quantitative growth and more on its ability to develop a sustainable, resilient, and competitive tourism model.

The European Union and its Member States are progressively reshaping the strategic framework for tourism to align it with the objectives of the European Green Deal², the Digital Decade³, the European Industrial Strategy⁴, and the European Agenda for Tourism 2030⁵. At the same time, international organisations and regional and local authorities face the challenge of translating these priorities into highly diverse territorial realities, where destinations experiencing intense tourism pressure coexist alongside others seeking to consolidate their development through tourism. This diversity demonstrates that the sector's challenges cannot be addressed by a single level of governance or by one category of stakeholders

¹ Council of the European Union, *Draft Council Conclusions on "Building a Sustainable and Competitive Tourism for the Future"*, ST 9065/26, Brussels, May 21, 2026, <https://data.consilium.europa.eu/doc/document/ST-9065-2026-INIT/en/pdf>.

² European Commission, "A European Green Deal," Strategy and Policy Priorities, last access, August 2026, https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en.

³ European Commission, "Europe's Digital Decade: Digital Targets for 2030," Shaping Europe's Digital Future, last accessed August 2026, <https://digital-strategy.ec.europa.eu/en/policies/europes-digital-decade>.

⁴ European Commission, "European Industrial Strategy," Single Market and Economy, last accessed August 2026, https://single-market-economy.ec.europa.eu/industry/strategy_en.

⁵ Council of the European Union, *Council Conclusions on the European Agenda for Tourism 2030*, ST 15441/22, Brussels, December 1, 2022, <https://data.consilium.europa.eu/doc/document/ST-15441-2022-INIT/en/pdf>.

alone. Instead, they require coordinated responses and sustained collaboration across the entire tourism ecosystem.

It is within this context that [FU-TOURISM](#) is positioned. The project contributes to the transformation of the European tourism ecosystem by supporting SMEs in their twin green and digital transition through a network of BSOs, Living Labs, and pilot projects implemented across different European destinations. By supporting business initiatives, FU-TOURISM has supported businesses to develop solutions in areas such as energy efficiency, circular economy, eco-design, digitalisation and business sustainability, while strengthening cooperation between public authorities, BSOs, research institutions and other actors within the tourism ecosystem.

Beyond its tangible results, the project has generated valuable practical knowledge on the opportunities, barriers and needs encountered by both tourism businesses and destinations throughout their transformation journey. This represents one of FU-TOURISM's main added values, complementing the strategic and institutional debate with evidence gathered directly from implementation, where policies, support mechanisms and innovative solutions are translated into tangible changes for businesses and destinations.

This document captures and systematises that knowledge with the aim of contributing to a more competitive, sustainable and resilient European tourism sector. The recommendations presented here are based on three complementary sources of evidence: the mapping of relevant tourism policies and initiatives, consultation with representative stakeholders from the European tourism ecosystem, and the lessons learned through the implementation of FU-TOURISM activities. Bringing together these three perspectives makes it possible to connect institutional priorities with the practical experience of those directly involved in managing and transforming tourism on a daily basis.

As a result, this document presents a set of strategic recommendations addressed to the wide range of actors capable of accelerating this transition. The recommendations are organised around the major strategic challenges shaping the future of European tourism—from SME decarbonisation and energy efficiency to digital transformation, skills development, access to finance, strengthening innovation ecosystems and building more resilient destinations—while identifying the specific role that different governance levels and ecosystem actors can play in each area. This approach reflects the understanding that the challenges facing European tourism cannot be solved through isolated action, but require coordinated efforts across all levels of governance and among all stakeholders involved in the tourism ecosystem.

While these recommendations speak primarily to EU and national policymakers—the actors best placed to close the gap between the ambitions already agreed at EU level and what actually reaches tourism SMEs and destinations—they remain grounded in the FU-TOURISM Stakeholder Workshops events and in the consortium's own implementation experience, and are directly usable by the consortium's tourism ecosystems. Each of the six recommendations that follow is illustrated with a concrete example drawn from the Local Tourism Transition Action Plans developed by the consortium's own destinations, so that FU-TOURISM's tourism ecosystems can draw on this paper in two ways: as a shared reference for their own advocacy with regional and national authorities, and as a benchmark against which to measure and continue their transition work beyond the project's lifetime.

1.1 Evidence Base

These recommendations rest on three complementary sources: a review of the EU tourism policy framework (the Transition Pathway for Tourism, the European Agenda for Tourism 2030, the EU Tourism Dashboard, and related Council, Parliament, EESC and CoR contributions); a consultation with stakeholders across the tourism ecosystem; and the practical experience of FU-TOURISM's own Acceleration Programme, Living Labs and Stakeholder Workshop. The full methodology, including how the policy review and the consultation were designed, is set out in Annex A.

The consultation, in brief

Respondent profile	European/international networks, national bodies, and regional or local destination-level actors — business associations, DMOs, public authorities, tourism SMEs, support organisations — across multiple EU Member States
Top-cited policy priorities	Digitalisation and Artificial Intelligence (53%), skills and training (47%), SME competitiveness and destination management (33% each)
Do current EU priorities reflect the sector's real needs?	Partially (73%); a minority said yes or no outright (13% each)
Top-cited barriers to a more competitive, sustainable sector	Lack of funding (53%), skills shortages (40%), cost of the green transition, institutional fragmentation and lack of coordination (33% each)
Area seen as most needing public intervention	Funding (33%), data (20%), green transition, AI and skills and training (13% each)
Level of governance that should lead the transformation	National governments (33%), with the EU and shared leadership close behind (27% each)
Actors that should play a bigger role	European Commission (53%), national governments and DMOs (33% each), businesses (27%)
Trends expected to have the greatest impact over the next decade	Climate change (67%), Artificial Intelligence (60%), demographic change (47%)

Coordination among actors rated sufficient?	Average 2.3 / 4 — the large majority rated it 2 or 3; no respondent selected the top score
Sector rated prepared for the transition?	Average 2.3 / 4 — the large majority rated it 2 or 3; very few selected the top score

Consultation sample: 15 respondents (n=15)

2. POLICY RECOMMENDATIONS

European tourism is undergoing a profound transformation driven by the green and digital transition, evolving consumer expectations, the need to strengthen destination resilience, and growing demand for more sustainable, competitive and inclusive development models. In this context, SMEs—which account for the vast majority of Europe's tourism businesses—play a central role. However, their capacity to adapt to these changes depends largely on the policy, regulatory and financial environment in which they operate, as well as on access to support instruments tailored to their specific needs.

Drawing on the analysis of European tourism policies, the review of relevant literature, and the lessons learned through the implementation of FU-TOURISM, this document identifies the main challenges shaping the transformation of the European tourism ecosystem and presents a set of recommendations aimed at supporting a more sustainable, digital, resilient and innovative transition.

For this reason, the recommendations are organised around the major strategic challenges facing the sector rather than by administrative level. This approach makes it possible to address each challenge from a comprehensive perspective, while identifying the respective roles of European institutions, national governments, regional and local authorities, BSOs, and the private sector. It also reinforces the coherence between the analysis presented in the previous sections and the policy recommendations that follow.

2.1 Accelerating the Green Transition of Tourism SMEs

RECOMMENDATION

Consolidate the currently dispersed green-financing instruments for tourism SMEs into fewer, clearly signposted access points; expand public guarantee schemes that reduce the risk perceived by financial institutions for seasonal-revenue businesses; and require that financing be bundled with technical advisory services — diagnostics, training, certification support — rather than offered as capital alone.

Who: European Commission and Member States (managing authorities for Cohesion Policy, Interreg and the COSME/SMP successor programme)

By when: Ahead of the next COSME/SMP successor programme and the Transition Pathway for Tourism's 2027 review.

Evidence: FU-TOURISM Stakeholder Workshop (Green Key Belgium, Green Site); 33% of consulted stakeholders named green-transition costs among the top three barriers to competitiveness and sustainability; EIB data showing SMEs invest in energy efficiency at half the rate of large companies⁶.

The green transition has become one of the defining priorities for the transformation of European tourism. Reducing the sector's environmental footprint is no longer solely a climate objective, but also a prerequisite for enhancing competitiveness, strengthening resilience and responding to evolving regulatory requirements and market expectations. For tourism SMEs, moving towards more sustainable business models means embedding energy efficiency, renewable energy, circular economy principles and more efficient resource management into the core of their operations.

However, this transformation requires far more than business commitment alone. The limited technical and financial capacity of many small businesses, together with the complexity of the current landscape of funding schemes and support programmes, calls for a policy framework that combines accessible financing, specialised technical assistance and innovation support tailored to the realities of the tourism SME ecosystem.

Energy efficiency and renewables adoption remain out of reach for SMEs without simplified access to financing and technical support.

Hotels and other accommodation providers are among the most energy-intensive subsectors within tourism and account for approximately 2% of global tourism-related CO₂ emissions⁷. At the same time, European SMEs invest in energy efficiency at only half the rate of large companies⁸, demonstrating that the sector's energy transition depends not only on the availability of technologies but also on easier access to financing and technical support.

⁶ European Investment Bank, *Unlocking Energy Efficiency Investments*, Luxembourg: European Investment Bank, January 2025, <https://www.eib.org/files/publications/20250106-11092025-unlocking-energy-efficiency-investments-en.pdf>.

⁷ UN Tourism, "Hotel Energy Solutions (HES)," last accessed August 2026, <https://www.untourism.int/hotel-energy-solution>.

⁸ European Investment Bank, *Unlocking Energy Efficiency Investments*, Luxembourg: European Investment Bank, January 2025, <https://www.eib.org/files/publications/20250106-11092025-unlocking-energy-efficiency-investments-en.pdf>.

The European Union has established an extensive framework to support this transition—including Cohesion Policy funds, Interreg programmes, COSME, funding linked to the European Green Deal, and energy labelling schemes. However, the experience of FU-TOURISM shows that these instruments are often difficult for microenterprises with limited administrative capacity to identify, access and successfully apply for. This affects investments both in energy efficiency improvements—such as insulation, heating and cooling systems, or lighting—and in renewable energy solutions, including photovoltaic self-consumption, biomass or geothermal energy, depending on local conditions.

The practical experience gained through FU-TOURISM demonstrates that accelerating the energy transition of tourism SMEs requires more than financial incentives alone. During the FU-TOURISM Stakeholder Workshop, representatives from the European Commission, public authorities, business organisations and specialised organisations such as Green Key Belgium agreed that many small businesses lack the technical knowledge and expertise needed to initiate energy transition projects. Among the solutions discussed were combining financial instruments with technical advisory services, diagnostic tools, training and tailored support to facilitate measures such as improving energy efficiency, optimising water and energy consumption, and obtaining environmental certifications.

These findings reinforce the need to simplify and consolidate green financing mechanisms, which are currently dispersed across multiple European programmes, while expanding public guarantee instruments that reduce the risks perceived by financial institutions when supporting SMEs with seasonal income patterns. Linking these financial instruments to specialised advisory services would accelerate the uptake of energy efficiency measures and renewable energy solutions, particularly among microenterprises with limited technical and administrative capacity.

Circular economy and eco-design remain marginal in tourism SMEs unless embedded into daily business practice through hands-on technical guidance.

Beyond energy, the green transition requires rethinking how tourism products and services are designed and how the resources they consume are managed throughout their lifecycle. For example, restaurants and food services generated 9% of all food waste in the European Union in 2023⁹, illustrating the considerable scope for improving resource efficiency across the tourism value chain. In response to these challenges, eco-design—whether applied to the renovation of tourism facilities or the development of new tourism services and experiences—enables SMEs to anticipate and minimise environmental impacts from

⁹ Eurostat, *Food Waste and Food Waste Prevention - Estimates*, Statistics Explained (Luxembourg: Publications Office of the European Union), last accessed August 2026, <https://ec.europa.eu/eurostat/statistics-explained/SEPDF/cache/110448.pdf>.

the outset rather than addressing them retrospectively. Likewise, efficient resource and waste management—including reducing water consumption, separating and recovering organic and packaging waste, and minimising food waste in hospitality services—translates these principles into everyday operational practices.

Discussions held during the FU-TOURISM Stakeholder Workshop provided concrete examples of how these principles can be translated into practice. Organisations such as Green Site presented practical solutions for organising sustainable events, including waste prevention and separation strategies, composting, material reuse and water conservation measures. Green Key Belgium demonstrated how environmental certification schemes help hotels and other tourism establishments integrate the efficient management of resources, waste and energy into their day-to-day operations. These examples illustrate that circular economy approaches are most effective when SMEs have access to practical tools, specialised advice and structured support that enables them to progressively integrate these practices into their business models.

The experience gathered through FU-TOURISM also demonstrates that such practices are rarely adopted spontaneously by SMEs operating with limited resources. Instead, they require targeted technical support capable of translating circular economy principles into practical operational decisions adapted to different types of tourism businesses, whether accommodation providers, restaurants or tourism activity operators. This reinforces the need to extend this type of specialised advisory support beyond the destinations and pilot projects where it is currently available.

Regional and local authorities, together with national administrations responsible for implementing European support instruments, play a decisive role in adapting both energy and circular economy policies to the specific conditions of each tourism destination. Discussions throughout the project also highlighted the importance of bringing these instruments closer to local businesses through accessible support services, technical advice and collaborative platforms involving public authorities, BSOs and tourism businesses. Tailoring financing instruments, capacity-building programmes and advisory services to the characteristics of individual territories was consistently identified as a key factor in enabling SMEs to adopt circular economy practices and broader sustainability measures.

IN PRACTICE — FROM THE FU-TOURISM LOCAL ACTION PLANS

In Poreč-Parenzo, the Local Tourism Transition Action Plan proposes a green self-assessment and measurement toolkit that lets tourism SMEs verify and communicate a minimum set of sustainability measures, paired with a destination-level recognition scheme and explicit safeguards against greenwashing — verifiable evidence, alignment with EU green-claims rules. This is exactly the kind of low-administrative-burden instrument the recommendation above calls for at EU scale.

2.2 Driving Digital Transformation and Smart Tourism

RECOMMENDATION

Require that any EU- or destination-funded digital or smart-tourism platform report SME adoption and reuse — not only technical deployment — as a condition of continued funding, and fund the SME-facing ‘translation’ layer (diagnostic tools, technical assistance, data-literacy training) that connects SMEs to platforms that already exist rather than building new ones.

Who: European Commission, national governments and Destination Management Organisations

By when: From the next Digital Europe / COSME successor calls, aligned with the Digital Decade 2030 targets.

Evidence: 53% of consulted stakeholders named digitalisation and AI as their top policy priority — more than any other option; only 4% of EU accommodation and food-service businesses used AI in 2023, against 11% of travel agencies¹⁰.

Digital transformation, alongside the green transition, represents the second major pillar of the modernisation of European tourism¹¹. However, exchanges with stakeholders throughout the FU-TOURISM project reveal that a significant digital divide persists between large tourism operators and SMEs. While international distribution platforms and major hotel groups have embedded digitalisation, artificial intelligence and data management at the core of their business models, many European tourism SMEs continue to rely on basic digital tools and make only limited strategic use of the data generated through their own activities.

The stakeholder consultation also confirms that digitalisation remains a strategic priority for the sector. At the same time, respondents emphasised that its success will depend less on the availability of technology than on businesses' capacity to adopt and integrate digital solutions into their day-to-day operations. Technologies such as artificial intelligence, data analytics and digital platforms are widely recognised as opportunities to strengthen competitiveness, provided they are accompanied by technical support, specialised training and access to appropriate digital infrastructure.

Process digitalisation and data use remain the first—and most uneven—step of the tourism sector's digital transformation.

¹⁰ Eurostat, "Summer Peak: 31% of Tourism Nights in August and July," Eurostat News, July 7, 2026, <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20260707-1>.

¹¹ FU-TOURISM Consortium, *Policy Brief: Future-Ready business support ecosystems for Tourism SME transition to green and digital resilience*, European Union Single Market Programme, Grant Agreement No. 101121573, 2023.

The European Digital Decade and the *European Agenda for Tourism 2030*¹² identify digitalisation as a cross-cutting priority, while programmes such as *Digital Europe* and COSME provide support for the adoption of digital technologies by SMEs. However, evidence gathered through FU-TOURISM shows that many tourism SMEs digitalise individual business processes—such as bookings, invoicing or customer communications—without integrating the resulting data into strategic decision-making on pricing, occupancy, customer experience or business planning.

The experience of FU-TOURISM highlights the importance of supporting SMEs throughout this process with tools tailored to their level of digital maturity. During the Stakeholder Workshop, for example, *Wallonia Belgium Tourism* presented its **Digital Toolbox**, designed to assess the digital maturity of tourism businesses and identify priority actions to support their digital transformation. This initiative illustrates the valuable role that public authorities and BSOs can play by providing diagnostic tools, tailored guidance and technical support that enable SMEs to adopt digital solutions progressively and in line with their actual needs¹³.

These findings demonstrate that policies supporting the digitalisation of tourism SMEs should go beyond subsidising individual digital tools. They should also strengthen businesses' capacity to manage and use the data generated through these technologies strategically, as this is essential for digitalisation to translate into measurable improvements in competitiveness.

Artificial intelligence and smart destination platforms can only scale if SMEs are connected to the digital ecosystems being built around them.

In 2023, only 4% of accommodation and food service businesses¹⁴ in the European Union used artificial intelligence technologies, compared with 11% of travel agencies and tour operators. Applications such as personalised customer experiences, demand forecasting and dynamic pricing are rapidly transforming artificial intelligence from an emerging technology into a core component of tourism competitiveness. Likewise, smart destination management platforms are becoming increasingly important for planning, monitoring and managing tourism activity. Yet these technologies are often developed at destination level

¹² Council of the European Union, *Tourism in Europe for the Next Decade: Sustainable, Resilient, Digital, Global and Social – Council Conclusions*, ST 8881/21 (Brussels: Council of the European Union, May 27, 2021), <https://www.consilium.europa.eu/media/49960/st08881-en21.pdf>.

¹³ OECD, *OECD Tourism Trends and Policies 2026* (Paris: OECD Publishing, 2026), <https://doi.org/10.1787/3fd3cd75-en>.

¹⁴ OECD, *Artificial Intelligence and Tourism: Policy and Industry Considerations*, OECD Tourism Papers (Paris: OECD Publishing, 2024), https://www.oecd.org/content/dam/oecd/en/publications/reports/2024/12/artificial-intelligence-and-tourism_41e7f157/3f9a4d8d-en.pdf

or by large tourism operators, without clear mechanisms enabling SMEs to connect to them or benefit from the aggregated data they generate.

Activities carried out within FU-TOURISM highlighted the considerable potential of data-driven technologies to improve destination management. During the Stakeholder Workshop, participants explored solutions combining artificial intelligence, Big Data, the Internet of Things (IoT), satellite observation and visitor-generated data to support more effective tourism planning and smarter destination management. These experiences demonstrate that the key challenge is not simply to develop advanced digital platforms, but to ensure that tourism SMEs can access them, understand the information they provide and use these insights to strengthen their competitiveness.

The cases examined also show that the main obstacle is often not the availability of technology itself, but the absence of effective connections between destination-level digital platforms—frequently developed by Destination Management Organisations (DMOs) or local authorities—and the SMEs operating within those destinations. This reinforces the need to design these platforms in ways that actively integrate SMEs as users and beneficiaries of the data they generate, rather than treating them solely as providers of information.

IN PRACTICE — FROM THE FU-TOURISM LOCAL ACTION PLANS

In Brussels, the DMO's shared tourism-data service (visit.brussels)¹⁵ already distributes data automatically, via API, to partner sites across the region — but the local action plan itself notes that its success should be measured by SME adoption and reuse, not only by technical deployment: the same distinction this recommendation draws at EU level.

2.3 Strengthening Skills, Talent and Capacity Building

RECOMMENDATION

Replace one-off training schemes with continuous, sector-specific reskilling and upskilling mechanisms embedded in the ongoing support SMEs already receive, and explicitly link green- and digital-skills provision to the sector's demographic and workforce-renewal challenge rather than treating it as a skills-matching problem alone.

Who: National and regional governments, together with BSOs and training providers

By when: Through the next Pact for Skills — Tourism Ecosystem Partnership renewal cycle.

¹⁵ Datastore.brussels, "visit.brussels — Open Data," City of Brussels / hub.brussels, last access, September 2026, <https://datastore.brussels/web/organizations/39>.

Evidence: 47% of consulted stakeholders named skills and training among their top three policy priorities; skills shortages were the second most-cited barrier (40%); HOTREC estimates an average 10% workforce deficit in EU hospitality¹⁶.

The green and digital transition of European tourism ultimately depends on the people working in the sector. Exchanges held with stakeholders across the tourism ecosystem within the framework of FU-TOURISM confirm that the lack of adequate skills — both green and digital — is today one of the main barriers preventing tourism SMEs from keeping pace with the twin transition, and that this gap cannot be closed through one-off training, but requires continuous mechanisms for updating capacities.

Green and digital skills gaps are slowing down the tourism sector's transition as much as any regulatory or financial barrier.

The transformation of tourism is rapidly reshaping the skills demanded by businesses. The uptake of digital tools, the growing importance of sustainability in business management, and evolving consumer expectations are driving demand for increasingly specialised profiles, while many SMEs continue to struggle to access the talent they need. In this context, HOTREC warns that the European hospitality sector continues to face a structural staff shortage — with an estimated average workforce deficit of 10%¹⁷ — and notes that skills gaps in areas such as digitalisation and sustainability are further compounding this challenge. Along the same lines, the Pact for Skills – Large-Scale Skills Partnership for the Tourism Ecosystem¹⁸ identifies capacity building as one of the key enablers of the sector's transformation, placing among its priorities the strengthening of skills related to energy efficiency, the circular economy, sustainable management, data use, and artificial intelligence applied to tourism.

During the FU-TOURISM Stakeholder Workshop, the Belgian Travel Confederation presented the Belgian Travel Academy as an initiative aimed at strengthening the skills of students, professionals, and unemployed individuals interested in joining the tourism sector, combining continuous training with

¹⁶ HOTREC, *Skills and Labour Shortages: A Roadmap for Action*, HOTREC Hospitality Europe, January 2026, https://www.hotrec.eu/media/static/files/import/all_news_2026_2026_5/hotrec-hospitality-europe_skills-and-labour-shortages_a-roadmap-for-action_january-2026.pdf.

¹⁷ HOTREC, *Skills and Labour Shortages: A Roadmap for Action*, HOTREC Hospitality Europe, January 2026, https://www.hotrec.eu/media/static/files/import/all_news_2026_2026_5/hotrec-hospitality-europe_skills-and-labour-shortages_a-roadmap-for-action_january-2026.pdf.

¹⁸ European Commission, *Pact for Skills: Skills Partnership for the Tourism Ecosystem*, last accessed August 2026, https://pact-for-skills.ec.europa.eu/document/download/22ac3e09-680a-45b9-8d32-f5efeb2c6978_en?filename=14.%20Tourism.pdf.

content adapted to the new challenges of the green and digital transition. This example highlights the importance of developing flexible training pathways closely linked to business needs, rather than offering standardised programmes disconnected from the sector's operational reality.

The consultation responses reinforce this same conclusion. Participants repeatedly highlight the need to strengthen green and digital skills, promote continuous training programmes, and facilitate the adoption of new technologies, including artificial intelligence. Rather than one-off training actions, the contributions received point to the need to establish permanent capacity-building mechanisms, closely linked to the operational needs of SMEs and adapted to different territorial realities.

This convergence between the priorities identified by European institutions, the experiences developed within the framework of FU-TOURISM, and the contributions from tourism ecosystem stakeholders shows that the skills deficit does not affect all SMEs or all territories equally — pointing to the need to design training programmes tailored to the size, profile, and maturity level of each tourism business, rather than relying on generalist approaches for the sector as a whole.

Without continuous, accessible reskilling and upskilling pathways, tourism SMEs cannot retain the talent the transition requires.

Beyond identifying which skills are needed, the challenge lies in ensuring that workers and entrepreneurs can update them on an ongoing basis. High seasonality, employment turnover, and the predominance of microenterprises make it difficult for many SMEs to invest in structured training programmes, precisely at a time when updating capacities is essential to maintaining their competitiveness.

The experiences shared during the Stakeholder Workshop highlighted the value of combining training, technical advice, experience-sharing, and collaboration among BSOs, public administrations, universities, and businesses, enabling SMEs to build new capacities while implementing innovation and sustainability projects in real-world contexts.

These experiences show that capacity-building mechanisms are most effective when integrated into the ongoing support SMEs already receive — through BSOs, business networks, and other collaborative spaces — rather than being offered as isolated training programmes disconnected from the specific operational needs of each business.

National and regional administrations play a central role in integrating green and digital skills into vocational training systems and tourism employment strategies, while BSOs and training centres are key

to bringing this capacity building closer to the day-to-day reality of SMEs. Adding to this is the role of European institutions, which, through initiatives such as the Pact for Skills, facilitate coordination between administrations, the private sector, and training providers around shared priorities.

IN PRACTICE — FROM THE FU-TOURISM LOCAL ACTION PLANS

València's digital-transition action treats training as inseparable from the technology itself: every SME-facing tool it rolls out — the destination data package, the reporting dashboard, the Tourist Card and QR expansion — is paired with a mandatory data-literacy and mentoring cycle, tracked against its own target (300 SME staff trained by 2031, up from zero in 2026) rather than folded into a general digitalisation output (LTTAP València, Action A2). Tying skills delivery to each specific tool, instead of running training as a separate course, is one way to make continuous reskilling operational rather than aspirational.

2.4 Improving Access to Finance and Investment

RECOMMENDATION

Design blended-finance instruments — combining public funds, guarantees and private capital — that provide continuity of cash flow across a project's full lifecycle, from pilot to scale, rather than concentrating support at the early stage; and simplify application and reporting procedures specifically for micro and small tourism enterprises.

Who: The European Union, Member States, and financial institutions and public guarantee bodies

By when: Ahead of the next Multiannual Financial Framework negotiations and as a direct follow-up to the EU Startup and Scaleup Strategy.

Evidence: Lack of funding was the single most-cited barrier in the consultation (53%) and funding was also the area most often flagged as needing greater public intervention (33%).

Beyond financing specifically tied to the green transition, the sector faces a structural difficulty in accessing the capital needed to grow, innovate, and scale solutions that have already proven to work on a small scale.

No single financing instrument is enough: blended finance is what allows private capital to reach tourism SMEs that public funds alone cannot cover.

Access to finance remains one of the main challenges for European small and medium-sized enterprises. The latest edition of the Survey on the Access to Finance of Enterprises (SAFE)¹⁹, produced by the European Central Bank and the European Commission, shows that SMEs continue to face more restrictive financing

¹⁹ European Central Bank, "Survey on the Access to Finance of Enterprises: tightening of credit standards", press release, 2 February 2026, <https://www.ecb.europa.eu/press/pr/date/2026/html/ecb.pr260202~71c8405376.es.html>

conditions, marked by rising credit costs and still-limited availability of funding. Although this situation affects the business fabric as a whole, its effects are particularly significant in sectors such as tourism, where microenterprises and seasonal-revenue business models predominate, increasing the perceived risk on the part of financial institutions. In this context, public funding — European funds, cohesion lines, and national and regional grants — is essential to reduce the initial risk of innovative projects, but on its own it does not reach the volume of investment that the sector's transformation requires. Blended finance mechanisms, which combine public resources, guarantees, and private investment, make it possible to mobilise additional capital and expand financing opportunities for SMEs that would otherwise face greater difficulties accessing credit. Discussions held during the Stakeholder Workshop highlighted that tourism SMEs need not only financial resources but also guidance to identify the most suitable calls, prepare competitive applications, and access collaborative networks that facilitate the implementation of innovative projects. This view reinforces the importance of moving towards financing instruments that integrate financial support, technical advice, and business mentoring as part of a single investment strategy.

This perception is clearly supported by the consultation carried out within the framework of FU-TOURISM. The responses obtained show broad consensus around the need to strengthen access to finance for tourism SMEs, identifying this area as one of the main priorities for public action. However, participants agree that the challenge lies not only in increasing the resources available, but also in simplifying access procedures, reducing the administrative burden, and designing instruments better suited to the reality of small businesses, particularly during the implementation and scaling phases of innovative projects.

Financing instruments remain concentrated on the early stages of a project, leaving little support for tourism SMEs ready to scale what already works.

The need to strengthen financing for scaling phases has recently been acknowledged by the European Commission in the EU Startup and Scaleup Strategy²⁰, which identifies the difficulty of supporting innovative companies throughout their entire development cycle — from project launch through to growth and market expansion — as one of the main challenges facing the European ecosystem. Although this strategy is cross-cutting in scope and not specifically aimed at tourism, it highlights a limitation that also affects innovative tourism SMEs: the existence of sufficient instruments to launch pilot projects, but a much more limited offer of mechanisms to consolidate and scale solutions that have already demonstrated their

²⁰ European Commission, *Horizon Europe Work Programme 2023-2025: 8. Climate, Energy and Mobility*, last accessed August 2026, https://research-and-innovation.ec.europa.eu/document/download/2f76a0df-b09b-47c2-949c-800c30e4c530_en.

viability. Exchanges held during FU-TOURISM likewise showed that many innovative initiatives manage to launch pilot projects but face greater difficulties when it comes to consolidating or expanding their scope. This need to support businesses beyond the initial phase came up repeatedly in discussions among administrations, BSOs, and sector representatives, underlining the importance of designing support instruments that provide continuity for the projects with the greatest potential impact.

This experience points to a structural gap in the financial support ecosystem: the absence of instruments specifically designed to support the shift from the pilot phase to larger-scale implementation — a gap that limits the real return on the investment already made in the sector's innovation and sustainable transition.

Financial institutions and public guarantee bodies play a decisive role here in designing instruments adapted to the real risk profile of tourism SMEs, while BSOs are key to guiding businesses towards the right instrument for each stage of their development. The European Union, for its part, can strengthen its role by facilitating coordination between funds and programmes that are currently scattered, so that a tourism SME can find continuity of financial support throughout the different phases of its transition, not only at start-up.

IN PRACTICE — FROM THE FU-TOURISM LOCAL ACTION PLANS

Several Athens-based FU-TOURISM-supported SMEs that had already reached the market — an AI booking assistant, an AI guest-communication tool live across 300+ properties, a digital training platform for travel agents — independently flagged the lag between grant instalments, rather than the total amount available, as their main constraint on scaling, calling for financing “that survives gaps between grant tranches”. Continuity of cash flow between disbursements may matter as much as the total volume of funding.

2.5 Building Stronger Tourism Innovation Ecosystems

RECOMMENDATION

Recognise Business Support Organisations and Living Labs as permanent innovation infrastructure — with continuity funding that outlasts individual project cycles — and establish permanent multi-level coordination mechanisms (shared data platforms, regional one-stop coordination points) with direct SME representation and transparent, measurable follow-up.

Who: The European Commission and national/regional authorities

By when: Starting with FU-TOURISM's own Continuation Strategy (D3.3) as an immediate test case, and carried into the design of the next COSME successor programme.

Evidence: Coordination among ecosystem actors was rated 2.3 out of 4 on average by consulted stakeholders, with no respondent rating it fully sufficient; the European Commission was the actor most often named as needing a more prominent role (53%).

None of the transitions described in the previous challenges — green, digital, skills, or financing — can take hold in isolation. FU-TOURISM's experience confirms that the speed and quality of these transformations depend, to a large extent, on the strength of the innovation ecosystem surrounding the tourism SME: the existence of nearby support structures, spaces to test solutions before scaling them, and effective channels for knowledge transfer across the academic, technological, and business spheres.

The consultation also shows that collaboration among administrations, businesses, universities, and support organisations remains one of the main challenges for building effective innovation ecosystems. Although participants acknowledge progress in cooperation among the different actors, the responses reflect considerable room for improvement in coordination across governance levels, knowledge transfer, and the creation of stable networks that can accelerate innovation and facilitate the adoption of solutions by tourism SMEs.

Business Support Organisations and Living Labs are the missing link between European innovation priorities and what actually happens inside a tourism SME.

SMEs' capacity to innovate does not depend solely on their internal resources, but also on the ecosystem in which they operate and their access to collaborative networks, specialised knowledge, and support services tailored to their needs. In this regard, the available evidence shows that businesses embedded in strong innovation ecosystems have greater opportunities²¹ to access new technologies, build capabilities, establish strategic alliances, and accelerate the adoption of innovative solutions. However, many SMEs still struggle to connect with these resources, especially in highly fragmented sectors such as tourism. European tourism innovation strategies often assume that priorities defined at the institutional level naturally trickle down to businesses, but FU-TOURISM's experience shows that this translation requires active intermediaries. Through a network of BSOs and Living Labs deployed across different European destinations, the project has enabled SMEs with limited resources and innovation capacity to access

²¹ OECD, *OECD SME and Entrepreneurship Outlook 2023* (Paris: OECD Publishing, 2023), https://www.oecd.org/content/dam/oecd/en/publications/reports/2023/06/oecd-sme-and-entrepreneurship-outlook-2023_c5ac21d0/342b8564-en.pdf.

technological solutions, green and digital transition methodologies, and experimentation spaces that would otherwise be out of their reach.

All of this reinforces the fact that these proximity structures are not simply a complement to the tourism innovation ecosystem, but a condition for it to function at all: without them, European innovation priorities rarely translate into real change within the SME.

Innovation in tourism SMEs stalls when knowledge stays inside universities and research centres instead of flowing into clusters and everyday business practice.

Although European tourism benefits from a growing research and innovation base, knowledge transfer from universities and research centres to SMEs remains uneven and depends heavily on the existence of intermediary mechanisms such as clusters, collaborative projects, open innovation spaces, and regional innovation ecosystems. The OECD notes that collaboration between universities and businesses rarely happens spontaneously and requires structured channels to facilitate knowledge exchange, such as collaborative research, academic spin-offs, co-patenting, innovation networks, and other forms of sustained cooperation among the different actors in the ecosystem. The FU-TOURISM Stakeholder Workshop is an example of this collaborative approach, bringing together universities, specialised organisations, public administrations, and tourism sector representatives to exchange knowledge on artificial intelligence, sustainability, accessibility, mobility, and the circular economy. Spaces of this kind make it possible for knowledge generated in academic and technological settings to be discussed, adapted, and applied to the real needs of tourism SMEs, fostering innovation that is more open and more connected to the local territory.

This approach points to the need to strengthen public-private cooperation channels and to give continuity to tourism clusters and innovation spaces beyond the lifespan of individual projects, so that the knowledge generated is not lost once the funding that made it possible comes to an end.

Consolidating these ecosystems requires recognising BSOs and Living Labs as permanent innovation infrastructure, rather than merely as instruments tied to European projects of limited duration. Ensuring their continuity would help sustain the collaborative networks already built, facilitate ongoing knowledge transfer, and accelerate the adoption of innovative solutions by tourism SMEs.

In Poreč-Parenzo, the local tourism group brought together the city and a diverse range of tourism actors throughout the FU-TOURISM process, creating a stable space to identify local transition needs, exchange experience and feed practical priorities into the destination's action planning. Its continued use illustrates how a local multi-stakeholder structure can connect SMEs, public authorities and other ecosystem actors over time, rather than relying on one-off consultation.

2.6 Promoting Sustainable, Resilient and Well-Governed Destinations

RECOMMENDATION

Strengthen destination-governance bodies with real powers and resources beyond a purely promotional mandate, and adopt broader destination-performance indicators — climate resilience, environmental pressure, community wellbeing — alongside arrival and overnight-stay statistics.

Who: Regional and local authorities, supported by Destination Management Organisations and the EU

By when: Ahead of the 2027 International Year of Sustainable and Resilient Tourism.

Evidence: 31.1% of all EU overnight stays in 2025 were concentrated in July and August alone, reaching 54.5% in Croatia²²; consulted stakeholders rated the sector's preparedness to meet these challenges at 2.3 out of 4 on average, with only one respondent selecting the top score.

The five previous challenges share a common horizon: tourism SMEs that are more efficient, digitalised, skilled, well-financed, and connected to innovation ecosystems. But these business-level transformations can only translate into a more sustainable, resilient, and competitive European tourism sector when they take place within destinations capable of managing their evolution in an integrated way, anticipating climate and social risks, and continuously evaluating the impact of the policies implemented.

Destination governance determines whether individual SME transitions add up to a genuinely sustainable destination, or remain isolated improvements.

Eurostat data show that, in 2025, 31.1% of all overnight stays recorded in tourist accommodation across the European Union were concentrated in July and August²³. This seasonality was even more pronounced in some destinations, such as Croatia (54.5%), Bulgaria (43.4%), and Greece (41.6%), where a very significant share of annual tourism activity is concentrated in just two months. This temporal concentration

²² Eurostat, "Summer Peak: 31% of Tourism Nights in August and July," Eurostat News, July 7, 2026, <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20260707-1>.

²³ Eurostat, "Summer Peak: 31% of Tourism Nights in August and July," Eurostat News, July 7, 2026, <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20260707-1>.

highlights that effective destination management — based on coordination among public administrations, businesses, DMOs, local communities, and other territorial actors — is an essential condition for individual SME transitions to translate into a genuine transformation of the destination as a whole, rather than isolated and uncoordinated improvements. Managing tourist flows, in particular, requires these governance structures to distribute visitor pressure throughout the year and, where necessary, across different areas of the territory, avoiding its concentration in specific periods and locations. Strengthening destination governance structures — equipping them with real powers and resources, beyond a purely promotional function — is a precondition for the rest of this document's recommendations to generate impact at territorial scale.

Climate resilience, community wellbeing and impact measurement must advance together, or destinations risk optimising for the wrong indicator.

Climate-ADAPT²⁴, Europe's reference platform on climate change adaptation, identifies tourism as one of the sectors most sensitive to climate impacts. Among the main risks facing European destinations are reduced snow cover, longer and more intense heatwaves, increased wildfire risk, changing precipitation patterns, and growing water scarcity, particularly in southern Europe. It also warns that heat stress may reduce the appeal of Mediterranean destinations during the summer months, while winter tourism faces significant risks in low-altitude destinations across central and southern Europe. This evidence shows that a destination's performance can no longer be assessed solely through the volume of arrivals and overnight stays, since these indicators reflect neither the territory's resilience to climate risks nor the real impact of tourism activity on the environment and the quality of life of local communities. Destination governance therefore requires broader assessment frameworks that incorporate indicators related to climate resilience, environmental pressure, local community wellbeing, and the territory's adaptive capacity, alongside traditional tourism activity metrics. Mainstreaming the use of more comprehensive impact indicators would allow destinations themselves — not only European institutions — to identify when tourism growth ceases to be compatible with the territory's resilience, its capacity to adapt to climate change, and the wellbeing of those who live there.

Regional and local authorities, together with DMOs, play a central role in destination governance by coordinating tourism planning, managing visitor flows, and engaging with local communities. The European Union contributes by providing strategic frameworks, promoting the exchange of good practices, and

²⁴ Climate-ADAPT, "Tourism," European Climate Data Explorer, European Environment Agency and European Commission, last access, September 2026, <https://climate-adapt.eea.europa.eu/en/knowledge/european-climate-data-explorer/tourism>.

supporting capacity building for more sustainable and resilient tourism management, while international organisations provide standards, methodologies, and specialised expertise on climate change adaptation and sustainable destination management.

Taken together, the six challenges addressed in this section show that the transformation of European tourism does not depend on a single level of governance or a single type of actor, but on the coordinated action of European institutions, national administrations, regional and local authorities, financial institutions, BSOs, knowledge centres, and tourism SMEs themselves. FU-TOURISM's experience demonstrates that, when these actors collaborate within the same ecosystem, it is possible to simultaneously accelerate the sustainability, competitiveness, and resilience of tourist destinations, generating an impact that outlasts the duration of individual projects and contributes to a structural transformation of the sector.

IN PRACTICE — FROM THE FU-TOURISM LOCAL ACTION PLANS

Athens offers a directly transferable governance model: in 2021 it became the first European city to appoint a Chief Heat Officer, and it extended its existing Heat Action Plan — early-warning systems, cooling centres, heat-alert protocols — explicitly to the tourism sector, including shaded/cooled visitor routing and flexible opening hours at heritage sites during peak-heat periods. Rather than building a new structure, this integrates tourism into resilience infrastructure the city already runs — a low-cost pattern other Mediterranean destinations exposed to the same risks could replicate.

3. CONCLUSION & LOOKING AHEAD

The six recommendations set out in this brief are addressed to the gap between what has already been agreed at EU level and what has reached tourism SMEs and destinations in practice: consolidating green and digital financing rather than adding new schemes; making SME adoption — not technical deployment — the measure of success for digital and smart-tourism platforms; continuous rather than one-off skills provision, tied explicitly to the sector's demographic challenge; blended finance designed for continuity of cash flow; BSOs and Living Labs recognised as permanent infrastructure; and destination-governance bodies given real powers and broader indicators of success.

2027, declared the International Year of Sustainable and Resilient Tourism by the UN, is a natural checkpoint for this agenda — a moment to show which of these six recommendations have been acted on, not only restated.

The transformation of European tourism requires moving from a phase focused on defining strategic priorities to a stage geared towards effective implementation and measurable impact. The analysis developed in this policy brief shows broad consensus on the sector's main challenges: moving towards more sustainable models, strengthening resilience to external shocks, accelerating the digital transition, improving governance, and building the capacities needed to operate in an increasingly complex environment.

FU-TOURISM contributes to this implementation agenda by bringing together public authorities, BSOs, knowledge organisations and tourism SMEs, and by translating project experience and stakeholder evidence into practical policy recommendations. The value of these recommendations will ultimately lie in their uptake and in their capacity to support concrete action by SMEs and destinations.

Annex A — Evidence Base and Methodology (full detail)

This annex reproduces, in full, the methodology summarised in section 1.1 of the main text: how the policy landscape review, the stakeholder consultation and FU-TOURISM's own implementation experience were combined to build the six recommendations.

A.1 From Evidence to Action

Building recommendations through policy analysis, stakeholder engagement and practical implementation

The recommendations presented in this document are the outcome of an analytical process designed to connect the strategic priorities of European tourism with the practical experience of those directly involved in its management and transformation. Rather than offering a purely theoretical reflection on the future of the sector, this policy brief turns the evidence collected into recommendations that each name an actor and a deadline, aimed at accelerating the green and digital transition of the European tourism ecosystem.

To achieve this, FU-TOURISM adopted an approach based on the triangulation of three complementary sources of knowledge: the analysis of the European policy and strategic framework, consultation with key stakeholders across the tourism ecosystem, and the lessons learned through the implementation of the project itself. Bringing together these three perspectives makes it possible not only to identify the shared priorities shaping the future of European tourism, but also to understand the barriers that hinder their implementation and the enabling conditions required to translate them into tangible outcomes for businesses and destinations.

A.2 Understanding the Policy Landscape

As a starting point, an analysis was carried out of the political and institutional landscape currently shaping European tourism policy. This included a review of the European Union's main strategies, initiatives and regulatory frameworks, together with contributions from international organisations, European territorial cooperation networks and representative organisations from the tourism sector. Rather than providing an exhaustive inventory of existing policies, the purpose of this review was to identify the strategic priorities shaping the European tourism agenda and to establish the policy context within which the findings of FU-TOURISM can be interpreted.

A shared strategic vision. The analysis confirms that the European Union has established a clear and widely shared strategic direction for the transformation of tourism, centred on the twin green and digital transition, resilience and inclusion, skills development, and stronger governance. This vision was first articulated in the *Transition Pathway for Tourism (2022)*²⁵, which introduced a common roadmap for public authorities, businesses and other tourism stakeholders. It was subsequently reinforced through the *European Agenda for Tourism 2030*²⁶, which translated these priorities into a shared political agenda between the European Commission and the Member States, structured around five key pillars: the green transition, the digital transition, resilience and inclusion, skills development, and governance.

From strategy to implementation. Monitoring the implementation of this agenda shows that the main challenge no longer lies in defining priorities—which are now broadly shared—but in ensuring their effective implementation. Successive *Taking Stock of Progress*²⁷ reports, together with the *First Report on the Implementation of the European Agenda for Tourism 2030 (2025)*²⁸, point to uneven progress across Member States and destinations, as well as persistent challenges related to multi-level governance,

²⁵ "EU Tourism Dashboard," European Commission, Joint Research Centre, last accessed August 2026, <https://tourism-dashboard.ec.europa.eu/>. <https://www.google.com/search?q=https://ec.europa.eu/tourism-dashboard/>

²⁶ Council of the European Union, *Council Conclusions on the European Agenda for Tourism 2030*, ST 15441/22, Brussels, December 1, 2022, <https://data.consilium.europa.eu/doc/document/ST-15441-2022-INIT/en/pdf>.

²⁷ European Commission: Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, *Transition pathway for tourism – Taking stock of progress by 2023*, Publications Office of the European Union, 2024, <https://data.europa.eu/doi/10.2873/775069>

²⁸ European Commission, *Report from the Commission to the Council on the Implementation of the European Tourism Agenda 2030*, COM(2025) 763 final, Brussels, December 16, 2025, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52025DC0763>

stakeholder coordination and financing the transition. The *EU Tourism Dashboard*²⁹ complements this assessment by providing comparable indicators on sustainability, digitalisation, resilience, competitiveness and governance. Together, these sources confirm that disparities between destinations—rather than the absence of a common strategic vision—now represent one of the main barriers to achieving a more balanced and coherent transition across the European tourism ecosystem.

Skills, territorial approaches and stakeholder participation as enabling conditions. A third group of sources complements this institutional perspective by identifying the conditions required for the transition to deliver tangible results. The *Pact for Skills – Skills Partnership for the Tourism Ecosystem* (2024)³⁰ identifies skills development as one of the key enabling factors, highlighting the need for lifelong learning, talent attraction and retention, and the continuous adaptation of skills to support the green and digital transition. European Parliament resolutions reinforce the importance of balancing competitiveness, sustainability and resilience, while placing particular emphasis on cultural heritage and support for SMEs. Opinions issued by the European Economic and Social Committee (EESC) underline the economic and social dimensions of the transition, recognising sustainability as a driver of long-term competitiveness and calling for greater involvement of businesses, workers and civil society in policy design. Meanwhile, contributions from the European Committee of the Regions (CoR) emphasise the need to place territories at the centre of the transition by strengthening multi-level governance and adapting European policies to the diverse realities of local destinations.

Taken together, this analysis reveals a high degree of consensus regarding the main challenges facing European tourism. These include accelerating the green and digital transition, strengthening resilience to climate, economic and geopolitical shocks, addressing skills shortages and labour market challenges, improving destination governance and the strategic use of data, enhancing SME competitiveness, and managing tourism pressure more sustainably across destinations. At the same time, the review demonstrates that the principal challenge no longer lies in defining strategic priorities, which are already widely shared across Europe, but in translating them into effective action through stronger coordination across governance levels and better adaptation of policies to diverse territorial contexts. This diagnosis

²⁹ European Commission, "EU Tourism Dashboard," Joint Research Centre, last accessed August 2026, <https://tourism-dashboard.ec.europa.eu/>

³⁰ European Commission, "Tourism Ecosystem and Large-Scale Skills Partnerships," Pact for Skills, last accessed August 2026, https://pact-for-skills.ec.europa.eu/about/industrial-ecosystems-and-partnerships/tourism-ecosystem-and-lsps_en.

provided the starting point for comparing institutional evidence with the insights gathered through the other FU-TOURISM activities and for underpinning the recommendations presented in this policy brief.

A.3 Listening to the Tourism Ecosystem

Building on the previous analysis, a stakeholder consultation was designed involving representatives from public authorities, business organisations, tourism businesses, Destination Management Organisations (DMOs), universities, research institutions, chambers of commerce, BSOs, civil society organisations and other key actors across the European tourism ecosystem.

The objective of the consultation was to compare the strategic priorities identified through the policy analysis with the perspectives and practical experience of those directly involved in managing, developing and transforming tourism. The questionnaire explored issues related to the future priorities of European tourism, the main barriers to the green and digital transition, coordination across stakeholders and governance levels, the needs of SMEs, access to finance and skills, and the areas where coordinated action could generate the greatest impact.

The results reveal a high degree of alignment with the priorities established in the European strategic framework. Participants consistently identified the green and digital transition, competitiveness, skills development and innovation as essential pillars for the future of European tourism. At the same time, the consultation confirms that the principal challenge no longer lies in defining these priorities, but in ensuring their effective implementation on the ground.

One of the strongest messages emerging from the consultation is the existence of a gap between the strategic direction established by European policies and the actual capacity of businesses and destinations to implement them. Most participants considered that current policy priorities only partially address the sector's needs, suggesting that while there is broad consensus regarding the direction of the transition, significant barriers remain when translating that shared vision into tangible results.

Among the main obstacles identified are the complexity of accessing funding opportunities, the limited capacity of many SMEs to develop transformation projects, the administrative burden associated with support programmes, and significant territorial disparities in access to financial resources, knowledge and technical assistance. In this context, respondents consistently emphasised that funding, while essential, is not sufficient on its own. Financial support must be complemented by technical assistance, capacity-building initiatives and long-term advisory services capable of transforming policy priorities into concrete investments and operational change.

The consultation also highlights the close interconnection between digital transformation, skills development and business innovation. Many participants stressed the need to strengthen both digital and green skills, facilitate the adoption of emerging technologies—including artificial intelligence—and improve SMEs' access to data management tools and digital solutions tailored to their size, needs and investment capacity.

Another recurring theme concerns the importance of strengthening governance and collaboration across the tourism ecosystem. Although respondents acknowledged progress in cooperation between public authorities, businesses and support organisations, the overall assessment indicates that coordination remains uneven and offers considerable room for improvement. Qualitative responses particularly emphasised the need to reinforce cooperation across different levels of governance, promote knowledge sharing, and consolidate innovation ecosystems capable of connecting businesses, public authorities, universities and BSOs.

Overall, the consultation adds a participatory dimension to this policy brief by identifying both the areas where broad consensus already exists and those where significant implementation barriers persist. As a result, the recommendations presented in this document reflect not only the priorities established by European institutions, but also the practical needs and experiences expressed by the stakeholders directly involved in shaping the future of the European tourism ecosystem.

A.4 Learning through Implementation

The third source of evidence derives from the practical experience gained through the implementation of FU-TOURISM itself. Through its work with BSOs, Living Labs, pilot projects and the support provided to the tourism SMEs selected under its Acceleration Programme, the project has generated valuable insights into how the green and digital transition is implemented in real business and territorial contexts.

This practical experience has provided a deeper understanding of the factors shaping the sector's transformation, including SMEs' capacity to adopt innovative solutions, the importance of access to knowledge and specialised support, the need to tailor transformation tools to the specific characteristics of each territory, and the key role played by local innovation and collaboration ecosystems. It has also highlighted the importance of providing continuous support mechanisms that enable European strategic priorities to be translated into concrete actions for businesses and destinations.

In addition, the events, workshops and knowledge-sharing activities organised throughout the project created opportunities for public authorities, businesses, Business Support Organisations, researchers and

other tourism stakeholders to exchange experiences and good practices. These interactions generated a valuable body of collective learning that complements both the strategic evidence gathered through the policy analysis and the practical insights emerging from the stakeholder consultation.