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## EU Sustainable Tourism Strategy

{SWD(2026) 777 final}

# Tourism: a strategic asset for Europe's competitiveness, sustainability and resilience

Tourism brings immense value to Europe, its economy and its cultural and social wealth. It sustains growth, employment, productivity, innovation and territorial development at national, regional and local levels[1]. Travelling in Europe embodies freedom of movement, cultural and natural diversity, safety and authenticity. The EU is the world's leading tourism destination. In 2025, it welcomed close to 600 million international tourists, representing almost 40% of all international tourist arrivals globally[2]. This leading position reflects the appeal of the European way of life, with tourism as its most immediate and tangible expression.

In 2025, tourism directly contributed 4.1% to the total EU gross value added, representing as much as 10.1% when considering the indirect and induced effects of tourism expenditure[3]. Across the EU, the sector employs more than 20 million people and comprises around 5 million companies, 99% of which are SMEs and 96% are microenterprises[4]. Tourism is also a key export sector, accounting for 11% of total EU services exports[5]. It generates extensive spillover effects across a wide range of sectors, including transport, construction, retail and agriculture, amplifying its economic contribution. Tourism investment can catalyse public and private infrastructure development and improve services that benefit visitors and residents alike[6].

Tourism fulfils an important social function for Europe by connecting people. By bringing economic activity and jobs directly to peripheral, disadvantaged and rural areas, tourism also helps people live and work within their community, making the freedom to stay a reality[7]. For islands, coastal, mountainous and outermost regions in particular, tourism plays a critical role for local economies and social cohesion. Tourism is also an important vehicle for Europe's global influence and soft diplomacy, shaping how the EU is perceived worldwide as a destination and as a model for sustainable and inclusive development. At the same time, the sector is significantly affected by geopolitical instability and shocks, particularly in the eastern border regions (by land and sea)[8] due to Russia's war of aggression against Ukraine and in Member States impacted by the conflict in the Middle East[9]. Nevertheless, Europe remains an open, safe and welcoming destination for all travellers.

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[1] Tourism represents a wider ecosystem of interconnected activities and industries. In this Strategy, 'tourism ecosystem' refers to this wider interconnected system, while 'tourism sector' is used when referring to tourism businesses and industry.

[2] World Tourism Organization (UN Tourism), 'World Tourism Barometer, Volume 24, Issue 2, Statistical Annex', May 2026.

[3] EU Tourism Dashboard, 'Economic contribution of tourism', accessed November 2026.

[4] European Commission, 'European Monitor of Industrial Ecosystems', accessed November 2026; EU Tourism Dashboard, 'Tourism Enterprises by Size (%)', accessed November 2026.

[5] Eurostat, 'International Trade in Services (since 2010)', accessed November 2026

[6] OECD, 'OECD Tourism Trends and Policies 2026', OECD Publishing, Paris, 2026.

[7] Enrico Letta, Much More than a Market – Speed, Security, Solidarity: Empowering the Single Market to Deliver a Sustainable Future and Prosperity for All EU Citizens, Report to the European Council, April 2024, p. 15; European Commission, 'Right to Stay Strategy – Your Region, Your Future', accessed November 2026.

[8] The EU's land and sea border with Russia, Belarus and Ukraine runs along regions in nine Member States (Finland, Estonia, Latvia, Lithuania, Poland, Slovakia, Hungary, Romania, and Bulgaria) as defined in European Commission, 'Communication on the EU's Eastern Regions Bordering Russia, Belarus and Ukraine: Strong Regions for a Safe Europe', COM(2026) 82 final.

[9] European Council Conclusions, 19 March 2026. en-20260319-european-council-conclusions.pdf.

Looking ahead, international arrivals worldwide are forecast to reach 2 billion by 2030, compared to 1.5 billion in 2025[10]. This continued growth creates further opportunities for EU tourism to foster growth, employment, innovation and social wealth. At the same time, visitor flows need to be managed effectively, for the benefit of both tourists and residents.

The European Parliament, Council as well as other institutional actors[11], and stakeholders[12], have called for a stronger and better coordinated EU-level policy response to the common challenges EU tourism is facing. This Strategy aims to deliver on this call, while building upon already solid EU policy foundations. The collaborative 2022 Tourism Transition Pathway[13] and the Council's European Agenda for Tourism 2030[14] have set a common course that is now taken forward.

**This Strategy sets out a vision** for an EU tourism ecosystem built on sustainability and innovation. It promotes competitiveness, resilience and inclusiveness, with the aim of unlocking productivity and inclusive growth. It seeks to consolidate Europe's position as the world's leading tourism destination, offering authentic, seamless and high-quality experiences that celebrate and protect its rich cultural heritage and biodiversity, for today's visitors and future generations.

**Strategic goals**

(i) Strengthen competitiveness of the sector: support the European business ecosystem.

(ii) Promote Destination Europe: reinforce Europe's position as a leading global tourism destination.

(iii) Promote sustainable, balanced and accessible tourism: spread the benefits of tourism across regions and seasons. Make travel affordable and inclusive for all.

(iv) Shift from volume to value: ensure tourism delivers tangible benefits for local communities.

(v) Build a more resilient and accessible ecosystem: prepare the sector for future shocks.

(vi) Drive the clean and digital transitions: support the sector in adopting clean, circular and innovative practices.

To unlock this vision, the Strategy sets out **three pillars with 10 action areas** with a strict focus on where EU initiatives bring most tangible value while fully respecting national competences, in line with Article 195 TFEU. The action areas are closely inter-connected, as only together they will **ensure the EU's competitiveness, sustainability and resilience**.

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[10] World Tourism Organization (UN Tourism), '50 Years of Tourism: Global Trends and Future Scenarios. Briefing Paper for the 26th UN Tourism General Assembly', UN Tourism, Madrid, November 2025.

[11] Council of the European Union, 'Building a Sustainable and Competitive Tourism for the Future – Council Conclusions', Council document 9075/26, May 2026; European Parliament, 'Resolution of 28 April 2026 on Enhancing Connectivity, Preserving Cultural Heritage, and Driving Local Excellence in European Tourism: Destination Management and Regional Tourism Growth (2025/2120(INI))', April 2026; European Economic and Social Committee (EESC), 'Tourism in the EU: Sustainability as a Driver for Long-Term Competitiveness', February 2026; European Committee of the Regions, 'Towards Sustainable and Resilient Tourism in the European Union: Strategy for Balanced and Adaptive Management', December 2025.

[12] European Commission, EU Sustainable Tourism Strategy, SWD°(2026)°777 final, November 2026.

[13] European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, 'Transition Pathway for Tourism', Publications Office of the European Union, February 2022.

[14] Council of the European Union, 'European Agenda for Tourism 2030 – Council Conclusions', Council document 15441/22, December 2022.

# 1 Boosting the competitiveness of EU tourism

Strengthening the tourism sector's competitiveness propels tourism destinations and businesses, in particular SMEs. Better access to data, less administrative burden, a skilled workforce and improved connectivity are essential for tourism to keep innovating and delivering on its development potential for regions and local communities.

## 1.1 Enabling SMEs to thrive: collaboration, simplification and growth

SMEs are the backbone of Europe's tourism ecosystem and its competitiveness. Tourism SMEs are major employers for women and young people, especially in rural, coastal and mountain areas as well as islands, where jobs are scarce. They also keep tourism income circulating locally through regional supply chains, with significant spillover effects to other local sectors. These SMEs also deliver authentic experiences that define Europe's appeal.

Tourism value is created by the destination as a whole, not only by individual businesses. However, SMEs too often operate in isolation with limited productivity gains, while larger players such as hotel groups, transport and tour operators, and booking platforms control capital, data and technology. Therefore, as a common thread for this Strategy, the Commission encourages **partnerships between SMEs and large companies operating in the tourism ecosystem** by the actions envisaged in this Strategy. This way, scale, innovation and local authenticity reinforce each other to the benefit of destinations and the wider tourism ecosystem.

To enhance the competitiveness of SMEs in the tourism sector, the Commission will support them in applying relevant EU legislation and making use of available tools related to the clean and digital transitions, and climate action. **Tourism SMEs will receive technical assistance, training and capacity-building to facilitate their transition**. Regional and local economies that are dependent on tourism are especially sensitive to climatic changes[15]. As the climate changes, so do travel patterns and conditions. To adapt to this shift towards a new geography of tourism, prevention, preparedness and foresight are essential, in particular for SMEs. To this end, the Commission will develop practical and easily accessible **tools for tourism SMEs and destinations to better prepare and adapt to climate change**.

A clear and simple regulatory environment is also a key foundation for tourism businesses to remain competitive. The Commission will launch an **EU Simplification Initiative** for tourism involving Member States and tourism stakeholders for focused exchanges feeding into the existing Commission Simplification Platform[16]. The objective will be to gather real-life and quantitative evidence of administrative burden faced by tourism businesses and destinations. Barriers may stem from EU rules but also from implementation issues and gold-plating[17]. The results may lead to recommendations for actions to further simplify EU rules for the tourism sector, in line with the Commission's better regulation agenda.

This initiative will intensify work to already ongoing simplification measures for the sector. Before the end of 2026, the Commission will present a proposal to **modernise VAT rules that apply to the travel and tourism sector**. This will bring them up to date with travel trends, digitalisation and the global context. It is expected that the reform will enhance the

[15] European Environment Agency, 'European Climate Risk Assessment', EEA Report 01/2024, Publications Office of the European Union, March 2024.
[16] European Commission, 'Simplification Platform', accessed November 2026.
[17] Gold-plating: when transposing EU directives into national law, Member States introduce national rules or requirements that go beyond what is required by the legislation.

competitiveness of EU travel operators and the level playing field within the EU, while simplifying compliance for passenger transport providers, especially SMEs[18].

Additionally, the Commission will in close consultation with Member States and stakeholders evaluate current frameworks and propose options and recommendations to improve comparability of **accommodation classification systems** and gradually explore including other certification systems such as information on accessibility and environmental performance. Systems vary significantly across Member States and regions, leading to confusion for visitors and to an uneven playing field for accommodation providers, especially SMEs operating across borders.

Action area 1: The Commission will

- launch an **EU Simplification Initiative** for tourism by 2027, to gather practical evidence of the administrative burden faced by the tourism sector and destinations,
- present by the end of 2026 a proposal to **revise and modernise VAT rules applying to the travel and tourism sector**, and
- launch focused **support to tourism SMEs** for their clean/digital transitions by 2027.

## 1.2 Data, digitalisation and innovation

Data, digitalisation and innovation are key to EU tourism competitiveness. Access to, use and secure exchange of data is essential to help destinations and businesses adapt to changes of traveller behaviour and market conditions while enabling informed decisions. However, these opportunities can only be fully seized in a fair digital environment, where market power does not translate into unfair commercial dependency. Online booking platforms must therefore operate with transparent commercial practices, effective contestability and fairness. This is essential for Europe's tourism ecosystem, which is largely made up of SMEs, and for a competitive, transparent distribution environment that supports consumer choice, innovation and resilience. The Digital Markets Act[19] and the Digital Services Act[20] provide the cross-cutting framework for this, and their effective and consistent enforcement is key to protecting the independence of tourism businesses and guaranteeing real choice for consumers.

To ensure access to high-quality, reliable data for destination management organisations (DMOs), businesses, individuals and policymakers at all governance levels, it is of utmost importance to **fully deploy the Common European Tourism Data Space**[21]. Further work on the Common European Tourism Data Space is needed to ensure strong operational links with other European sectoral data spaces and relevant data models[22]. **The Commission calls on Member States to strengthen stakeholders' awareness of the purpose and benefits of data sharing and of the Common European Tourism Data Space**.

Also, European official statistics continue to play an important role in providing data for public and private actors. Therefore, the Commission will present a proposal to **modernise Regulation (EU) 692/2011 concerning European statistics on tourism**. Its aim is to provide

[18] European Commission, 'VAT Package for Travel and Tourism', accessed November 2026.
[19] European Parliament and Council of the European Union, Regulation (EU) 2022/1925 of the European Parliament and of the Council of 14 September 2022 on contestable and fair markets in the digital sector and amending Directives (EU) 2019/1937 and (EU) 2020/1828 (Digital Markets Act)
[20] European Parliament and Council of the European Union, Regulation (EU) 2022/2065 of the European Parliament and of the Council of 19 October 2022 on a Single Market for Digital Services and amending Directive 2000/31/EC (Digital Services Act),
[21] European Commission, 'Towards a Common European Tourism Data Space: Boosting Data Sharing and Innovation across the Tourism Ecosystem', COM(2023) 478 final, July 2023.
[22] European Commission, 'Cultural Heritage Cloud', Research and Innovation, accessed November 2026.

more complete, granular, timely and cost-efficient official statistics on tourism[23]. Complementing official statistics, the EU Tourism Dashboard[24] is an established online knowledge tool, providing meaningful visualisations of tourism-relevant indicators, helping identify issues and facilitate policy initiatives. The Commission will further develop the Dashboard's analytical capabilities. To this end, the Commission will set up an **EU Tourism Observatory** to monitor developments across the sector, analyse important trends and provide insights for EU and national policies. **One of the deliverables will be developing a common performance framework for the sector**.

Data driven **artificial intelligence** (AI) is playing a pivotal role in reshaping the sector, affecting almost every aspect of the travel and tourism experience, including supporting more individualised experiences, efficient information exchanges and enhanced destination management. While AI solutions offer a strategic opportunity to strengthen the competitiveness and digital presence of destinations and businesses, it is essential that Europe keeps control over its data, narratives and value creation. The Commission will work with stakeholders on embedding tourism into the EU Apply AI strategy[25], to integrate best practices for the responsible and **safe uptake of AI in tourism**, based on use cases. It will open training opportunities through existing and upcoming EU initiatives, including the European Digital Innovation Hubs.

The imminent roll-out of EU Digital Identity Wallets and the future introduction of EU Business Wallets[26] offer secure and easy-to-use identification tools, which are essential for a seamless user-journey and simpler business processes. In particular, the EU Digital Identity Wallets will provide a secure trust framework for identifying and authorising AI agents in travel and tourism. With the traveller's consent, the agent would present the relevant credentials from their EU Digital Identity Wallet at each step from booking to local activities. Businesses would rely on AI agents authorised through their European Business Wallets, making clear which company each agent represents and what it is allowed to do. **The Commission will launch a pilot with public and private organisations testing the integration of agentic AI in the Wallets through real-life use cases**[27].

Innovation is one of the main drivers of the competitiveness of EU tourism, which has traditionally been at the forefront of technology development. The Climate Neutral and Smart Cities Mission[28] through its cohort of 112 cities, accounting for 12% of the EU population, aims at reducing sharply by 2030 the emission of Green House Gases in several sectors like energy, transport and waste, contributing thereby to more sustainable tourism. The European Innovation Council supports innovative start-ups developing strategic technologies with potential applications in the tourism sector, particularly in the fields of culture and creativity, mobility and clean technology[29]. The European Regional Innovation Valleys initiative supports interregional innovation in tourism[30]. Travel-tech startups are key drivers of innovation, but

[23] European Commission, 'European Tourism Statistics – Legislative Update', Have Your Say, accessed November 2026.
[24] European Commission, EU Tourism Dashboard, accessed November 2026.
[25] European Commission, 'Apply AI', Shaping Europe's Digital Future, accessed November 2026.
[26] European Commission, 'What Are the Large-Scale Pilot Projects?', EU Digital Identity Wallet, accessed November 2026.
[27] European Commission, 'Pilot Projects: What Are the Large-Scale Pilots', EU Digital Identity Wallet, accessed November 2026.
[28] European Commission, Climate Neutral and Smart Cities Mission, July 2025.
[29] European Commission, 'European Innovation Council', accessed November 2026.
[30] European Commission, 'Regional Innovation Valleys', accessed November 2026.

face persistent barriers around early-stage finance, market access and real-world validation[31]. **Tourism-focused incubators and accelerators** are in place across Member States, and the Commission will facilitate greater synergies among them, including through matchmaking events, to reduce fragmentation and facilitate cross-border scaling of innovative solutions, reinforcing European sovereignty. In 2027, Horizon Europe will fund technologies supporting sustainable cultural tourism through AI-driven visitor management, smarter low-carbon travel, immersive digital heritage, multilingual cultural mediation, and improved accessibility[32]. This will further support the competitiveness of the tourism sector, including via funding for beneficiary SMEs.

Action area 2: The Commission will

- support Member States in deploying the **Common European Tourism Data Space** by 2029 to ensure access to high-quality, reliable data,
- propose to **modernise Regulation (EU) 692/2011 concerning European statistics on tourism** by 2027,
- establish an **EU Tourism Observatory** by 2027 to monitor developments across the sector, analyse important trends and provide insights for EU policy, and
- facilitate **greater synergies among tourism start-ups and with investors** by 2027, including through matchmaking events.

## 1.3 Skills and talent for tourism

To boost competitiveness and economic sustainability, EU tourism must become a destination for talent, where skilled workers can thrive. Labour and skills shortages are significant obstacles for EU tourism to flourish[33], calling for integrated measures covering skills (upskilling and reskilling), workforce mobility, housing availability and affordability, fair working conditions, and improving the sector's overall attractiveness. Progress has already been made, but there are still significant skill gaps across Member States, regions and types of tourism models (e.g. coastal, alpine, urban). 92% of SMEs in EU tourism find it challenging to hire skilled staff, predominantly due to a shortage of applicants with the right skills[34]. DMOs face comparable challenges in the training and staffing required to fulfil their mandate, which spans the management of tourist flows and the delivery of memorable visitor experiences.

To provide the crucial training and talent development needed, the Commission will launch a high-quality **EU Tourism Academy** that includes the possibility to provide digital micro-credentials. The Academy will be supported by a network of national tourism institutes, universities, vocational training institutes and other relevant stakeholders that will develop and pool training content and learning programmes. It will be based on existing EU skills project deliverables and industry input as well as on the large-scale partnership in tourism under the EU Pact for Skills and the blueprint alliances for sectoral cooperation on skills in the tourism sector[35].

[31] OECD, 'Using Incubators and Accelerators to Support Travel and Tourism Start-ups', OECD Tourism Papers, No. 2026/01, OECD Publishing, Paris, August 2026.
[32] European Commission, 'Horizon Europe Cluster 2 Work Programme 2027: Future-proofing Sustainable Cultural Tourism', Horizon Europe Work Programme 2026–2027, pp. 116–120, accessed November 2026.
[33] Eurostat, 'Job Vacancy Rate by NACE Rev. 2.1 Activity – Annual Data', accessed November 2026.
[34] European Commission, 'Jobs and Skills in Tourism', Directorate-General for Mobility and Transport, accessed November 2026; OECD, 'OECD Tourism Trends and Policies 2026', OECD Publishing, Paris, 2026, accessed November 2026.
[35] FUTOUR Alliance, 'FUTOUR Alliance', PACTS4ALL, accessed November 2026.

The Academy will benefit from in-depth analysis of the tourism labour market provided by the **European Skills Intelligence Observatory**[36]. The analysis will leverage skills forecast models allowing for assessing occupational profiles and learning programmes matching most closely emerging future needs. In addition, it is key that qualifications and their levels are understood across Member States, for which the Commission recently proposed the **Skills Portability Initiative**[37], requiring Member States to issue interoperable and secure digital credentials for qualifications and requiring comparable information on qualifications.

The Commission will publish a **study on working conditions in tourism**, also covering collective bargaining, following consultations with all relevant stakeholders[38]. This will help identify solutions to increase the attractiveness of tourism jobs in the EU for a diverse workforce. This will include building on Social Dialogue frameworks, including launching new dialogues related to tourism such as the Social Dialogue for the hotel, restaurant and catering sector[39]. Following the adoption of the Fair Labour Mobility Package[40] and the Quality Jobs Roadmap[41], by the end of 2026, the Commission will present a legislative proposal for the Quality Jobs Act updating EU rules protecting workers while supporting productivity and competitiveness.

To help the sector tackle labour shortages after having explored all possible options within the EU, the Commission invites Member States to make full use of the possibilities provided under the **Seasonal Workers Directive**[42]**.** The Commission is also invites Member States to participate in the EU Talent Pool[43] and the Talent Partnerships[44]. The Commission will also exchange with Member States in relevant existing fora on best practices to address labour shortages affecting the tourism sector.

Action area 3: The Commission will

- launch a high-quality **EU Tourism Academy** by 2027 to provide the crucial training and talent development that the sector needs, and
- publish a **study on working conditions in tourism** by 2028.

## 1.4 Seamless and sustainable connectivity and infrastructures

The tourism sector's competitiveness depends on seamless, safe and smooth mobility across Europe, particularly important for islands, coastal, rural and remote areas. Enabling effective and sustainable connectivity lies at the heart of the Single Market, with the implementation of

[36] Galanakis, Y. and Vergote, W., 'European Skills Intelligence Observatory – Mapping of Skills Intelligence in the EU – Technical Report', Publications Office of the European Union, 2026, accessed November 2026.
[37] European Commission, 'Skills Portability: Helping Skills and Qualifications Travel Across Borders', accessed November 2026.
[38] The Commission initiative on 'Assessing working conditions and identifying solutions to increase the attractiveness of transport and tourism jobs in the European Union' will produce country fiches, background papers for workshops and culminate in a final conference and report planned for mid-2028.
[39] European Commission, 'Cross-Industry and Sectoral Social Dialogue', accessed November 2026.
[40] European Commission, 'Fair Labour Mobility Package', accessed November 2026.
[41] European Commission, 'Quality Jobs Roadmap', COM(2025) 944 final, December 2025.
[42] European Parliament and Council of the European Union, 'Directive 2014/36/EU of the European Parliament and of the Council of 26 February 2014 on the Conditions of Entry and Stay of Third-Country Nationals for the Purpose of Employment as Seasonal Workers', Official Journal of the European Union, March 2014.
[43] European Commission, 'EU Talent Pool', Directorate-General for Migration and Home Affairs, accessed November 2026.
[44] European Commission, 'Talent Partnerships', Directorate-General for Migration and Home Affairs, accessed November 2026.

the TEN - T transport network[45] and building and upgrade of tourism-relevant transport infrastructures.

For certain transport modes such as aviation, travellers have had easy access to tickets for decades. This is not the case for rail services and multimodal journeys. The Commission proposals for a **Regulation on Multimodal Booking,** the **Rail Ticketing Regulation and the targeted revision of the Rail Passenger Rights Regulation** (referred to as 'the Passenger Package')[46] will improve how online ticket distribution works, boosting consumer confidence, demand for rail travel and the overall competitiveness of the sector.

During the consultation on this Strategy, most stakeholders highlighted **high-speed rail as a priority to improve sustainable connectivity**. In 2025, the Commission adopted the High-Speed Rail Action Plan[47], which sets out steps to build a faster, more interoperable and better-connected network, reduce journey times, and make rail a more attractive alternative to short-haul flights. The Communication on Connecting Europe through high-speed rail announced further support for rail development, most of which will also benefit conventional passenger services, including night trains[48]. The Commission will further strengthen the **attractiveness of rail mobility for tourism**, including night trains and rail journeys as a form of tourism experience, by connecting railway and tourism stakeholders in **high-level events**.

Effective competition is essential for air connectivity, as shown by the growth in communities served since the liberalisation of EU air services. The Commission will propose to **revise the Air Services Regulation** to make air travel in Europe more reliable, transparent and resilient, to the benefit of tourism. Additionally, the fitness check of airport legislation[49] and the upcoming **renewed aviation strategy**[50] aim to keep the EU aviation market competitive and well connected through its airports, including in islands, remote areas, outermost regions and with third countries, while increasing the sustainability of the sector.

**Sea connections** are equally vital for reaching many destinations. EU ports handle around 395 million passengers a year and, as the EU Ports Strategy[51] recognises, they are lifelines for islands, coastal and the outermost regions. EU port and marinas infrastructures should be upgraded, modernised and become more sustainable. Where public needs cannot be met by the market on significant routes, the Commission will continue to support Member States in designing public service obligations, especially for remote, island and underserved regions. An obstacle that visitors experience when travelling by **leisure boat** in the EU is when recreational boating licences are not recognised across countries[52]. The Commission will seek to harmonise

[45] European Commission, 'TEN-T Governance', Directorate-General for Mobility and Transport, accessed November 2026.
[46] European Commission, 'One Journey, One Ticket, Full Rights: Commission Simplifies Europe-Wide Travel Booking and Train Travel', May 2026.
[47] European Commission, 'High-Speed Rail Plan', Directorate-General for Mobility and Transport, accessed November 2026.
[48] European Commission, 'Connecting Europe through High-Speed Rail', COM(2025) 903 final, November 2025.
[49] European Commission, 'Revision of the Air Services Regulation', Have Your Say, accessed November 2026; European Commission, 'Aviation Fitness Check of EU Airport Legislation', Have Your Say, accessed November 2026.
[50] European Commission, 'EU Aviation Strategy', Have Your Say, accessed November 2026.
[51] European Commission, 'Commission Unveils EU Ports Strategy to Strengthen Competitiveness, Security and Sustainability of European Ports', March 2026.
[52] European Commission, Directorate-General for Mobility and Transport, Panteia, Kourounioti, I. and Burgess, A., 'Study to Determine the Advantages and Drawbacks of a Possible Mutual Recognition of Boating Licences for Recreational Boat Operators – Final Report', Publications Office of the European Union, 2025, accessed November 2026.

this system with a proposal for a Council Decision to apply UNECE Resolution No. 40 on an International Certificate for Operators of Pleasure Craft.

Renting a car provides an opportunity to discover different destinations within and across borders. Today, there are still many barriers for multi-country trips in Europe. Consequently, the Commission will present a **legislative proposal for the easier and more affordable use of rental cars across borders** and will work with the car rental sector to develop digital solutions for contactless check-in. This will simplify multi-country and multimodal trips and reduce the costs of cross-border car rentals. A regular difficulty for tourists and coach operators is navigating **different local urban vehicle access restrictions**. The Commission will launch a new initiative making this information more widely available and accessible. Additionally, the recent revision of the Driving Licence Directive[53] provides for **mobile driving licences** issued by one Member State to be recognised by all others.

To make travel easier once tourists reach their destination, the Commission will work with public transport authorities and associations to explore solutions for the **EU-wide interoperability of local transport ticketing systems.** This will improve access to travel information and ticket purchasing, and make digital planning, booking and payment options more accessible, inclusive and easy to use. The Commission will also carry out a study on the development of the **local passenger transport-on-demand sector** (taxis and private hire vehicles with a driver). It will look into obstacles and its potential, in particular its support for decarbonisation and multimodal mobility, as well as its contribution to tourism.

**Active mobility** is a key enabler of sustainable tourism, providing zero-emission, healthy and affordable way of moving around for tourists, both in urban and rural areas. The Commission, Parliament and Member States committed, in the European Declaration on Cycling[54], to creating favourable conditions to support cycling as a sustainable means of recreation and tourism. The Commission will continue to promote cycling tourism by supporting the integration of cycling routes such as EuroVelo[55] into public transport and bike-friendly services, so that visitors can explore destinations in a sustainable manner.

Action area 4: The Commission will

- propose to **revise the Air Services Regulation** by 2027 to make air travel in Europe more reliable, transparent and resilient, and have a fitness check of airport legislation,
- propose **legislation for easier and more affordable use of rental cars across borders** by 2027,
- further strengthen the **attractiveness of rail mobility for tourism** by connecting railway and tourism stakeholders in **high-level events** by 2027, and
- explore solutions for **EU-wide interoperability of local transport ticketing systems** working with public transport authorities and associations by 2028.

[53] European Parliament and Council of the European Union, 'Directive (EU) 2025/2205 of the European Parliament and of the Council of 22 October 2025 on Driving Licences, Amending Regulation (EU) 2018/1724 and Directive (EU) 2022/2561, and Repealing Directive 2006/126/EC and Commission Regulation (EU) No 383/2012', Official Journal of the European Union, 2025.
[54] European Parliament, Council of the European Union and European Commission, 'European Declaration on Cycling', Official Journal of the European Union, C/2024/2377, April 2024.
[55] European Cyclists' Federation, 'EuroVelo', accessed November 2026.

# 2 Strengthening sustainability and building resilience

The long-term competitiveness of European tourism depends on economic, social and environmental sustainability. To achieve this, integrated and data-driven management approaches and trusted cooperation mechanisms across the tourism ecosystem are needed. Safeguarding the environment and building resilience is protecting the very foundation on which much of tourism is built.

## 2.1 Clean and circular transition, and environmental protection

Europe is the fastest-warming continent[56], facing more frequent extreme heat, intensified rainfall and floods, alongside increasing drought and declining rainfall in southern regions, and reduced snow availability in mountainous regions[57]. Tourism needs to further **reduce its climate and environmental footprint** by limiting emissions, pollution and waste, protecting biodiversity, animal welfare and natural resources[58]. Part of the solution is to implement business models based on circular economy practices, innovation, renewable energy and the **Environment, Social and Governance (ESG)** approach. Environmental sustainability brings enormous opportunities to the sector. This makes climate and environmental sustainability a priority to act for tourism stakeholders.

The tourism sector needs to implement business models **based on circular economy practices and innovation**, which will be supported by a forthcoming proposal for a Circular Economy Act[59]. **This is particularly important for islands, where circular practices can help alleviate pressures on waste and water management during peaks**. The Waste Framework Directive[60] sets a food waste reduction target of 30% by 2030 in the retail, restaurants, food services and households.

Tourism sustainability is especially important in dense urban areas with high flow of tourists, faced with challenges, including air and noise pollution. At the same time, many EU cities are frontrunners having successfully managed to reconcile tourism with high level of environmental protection and sustainable urban development[61].

The Commission recently adopted guidelines outlining how Europe's **Natura 2000 network of protected areas** can act as a powerful driver of environmentally sustainable and regenerative tourism, while safeguarding and improving the habitats and species it is designed to protect[62]. **Europe's network of mountain trails and huts** is one example of how active

[56] Copernicus Climate Change Service, 'Why Is Europe Warming So Quickly?', European State of the Climate 2025, accessed November 2026.
[57] European Environment Agency, 'European Climate Risk Assessment', EEA Report No. 1/2024, accessed November 2026.
[58] European Commission, 'EU Biodiversity Strategy for 2030: Bringing Nature Back into Our Lives', COM(2020) 380 final, May 2020; European Commission, 'European Water Resilience Strategy', COM(2025) 280 final, June 2025; European Commission, 'Commission Recommendation (EU) 2025/1179 of 4 June 2025 on Guiding Principles of Water Efficiency First', Official Journal of the European Union, OJ L, 2025/1179, June 2025.
[59] European Commission, 'Circular Economy Act', Have Your Say, accessed November 2026.
[60] European Commission, 'Waste Framework Directive', Directorate-General for Environment.
[61] European Commission, 'Benidorm Officially Kicks Off Its 2025 European Green Pioneer of Smart Tourism Year', Directorate-General for Mobility and Transport, February 2025; Benidorm City Council, 'Benidorm Wins European Green Leaf Award in Portugal and Will Represent EU Green Cities in 2028', accessed November 2026.
[62] European Commission, 'Staff Working Document: Natura 2000 and Sustainable Tourism', Directorate-General for Environment, accessed November 2026.

tourism can combine cultural heritage, public health, nature conservation, volunteering and rural development[63].

By the end of 2026, the Commission will finalise rules and guidance for hotels in using a tested method of Product Environmental Footprint, which will support hotels as they aim to measure and reduce their environmental impact. In addition, the Commission will present renewed **EU Ecolabel criteria for Tourist Accommodation Services**[64] to support more sustainable tourism business models. The Commission will also **support tourism SMEs in applying relevant EU legislation and available tools related to the clean transition and climate action**, including by developing a toolkit for SMEs with guidance implementing climate actions, offering training and capacity building actions.

Action area 5: The Commission will

- support **tourism SMEs in applying relevant EU legislation and available tools related to the clean transition and climate action**, including by developing for SMEs a toolkit with guidance, offering training and capacity building actions by 2028, and
- present renewed **EU Ecolabel criteria for Tourist Accommodation Services** by 2028 to support more sustainable tourism business models.

## 2.2 EU Model for Tourism Management

National authorities, DMOs, regions and local authorities are at the forefront of managing the growing and overlapping set of challenges and opportunities tourism is facing. Additionally, tourism and other national, regional, urban or territorial development policies are often managed in silos. Successfully navigating this multitude of tasks requires integrated management practices. To support DMOs, building on existing best practices in Member States, the Commission will propose an **EU Model for Tourism Management**, which can serve as a voluntary benchmark for Member States when, for example, drawing up their National and Regional Partnership Plans, accessing EU funds and leveraging private capital. The Model will be developed in close consultation with Member States, regions, local authorities and stakeholders.

The Model will progressively bring together existing and new EU support measures and practical tools relevant for integrated tourism management. It will provide a collection of flexible and evolving practical instruments to help destinations integrate tourism into territorial development and social cohesion strategies and reconcile tourism development with both environmental and social sustainability objectives. It will establish a common reference framework to address common challenges, strengthening the involvement of local authorities, SMEs and communities in decision-making. Building on lessons learnt from relevant EU initiatives[65], this work will start with a preparatory phase launched in 2027 aiming at developing a blueprint for the methodology, governance framework, tools, success criteria and benchmarks, and to pilot its application. In this context and together with Member States and stakeholders, the Commission will also **explore the possibility to develop a common framework to certify sustainable destinations**.

[63] European Hiking Federation (ERA), 'EUMA and ERA Charter on European Hiking and Mountain Trails', accessed November 2026.
[64] European Commission, Joint Research Centre, 'EU Ecolabel for Tourist Accommodation', accessed November 2026.
[65] European Commission, 'D3HUB: Data-Driven Transition of European Tourism', accessed November 2026.

Tourism must not only benefit travellers, tourism businesses and local economies, but also coastal and rural communities[66], in line with the EU strategy on resilient, prosperous and liveable coastal communities[67] as well as the European Ocean Pact[68]. Tourism is a driver of prosperity that provides a lifeline for demographic vitality and ensures the social and economic sustainability of the territories in which it develops harmoniously. In this context, particular attention needs to be paid to the right balance between supply and demand across EU destinations and its distribution across territories and seasons[69]. While some destinations attract many visitors, other areas, equally rich in potential, struggle to attract visitors and capture the economic benefits that tourism brings. Seasonality remains strong, with 42% of all nights spent concentrated in the three most popular months[70]. To address these issues, the Commission will propose a **Council Recommendation on Balanced Tourism Management** and an **EU Toolbox for Balanced Tourism**. The aim is to help destinations achieve balanced tourism focusing on common solutions that can be adaptable to local contexts, including in cross-border contexts. These could highlight how destinations could address seasonal concentration by promoting year-round tourism, adapting to changing conditions, while improving connectivity to strengthen the potential for lesser-known destinations to attract visitors. The right balance to strike is between tourist demand at a specific location and time, and the capacity of the destination. The Toolbox will bring together common approaches and principles from across the EU and beyond[71], including insights into measures related to short-term rentals[72].

Cruise tourism, both at sea and on inland waterways, offers significant economic opportunities for coastal and island destinations, ports, cities and local businesses. In addition, cruise ship building underpins the European industrial maritime sector, contributing significantly to Europe's strategic maritime autonomy. From this perspective it is important to protect the EU's competitiveness as an area of operation for cruise ships. At the same time, cruise tourism requires carefully balancing arrivals and departures, in certain destinations, and managing its impacts. To support this objective, the Commission will set up a **Cruise Cooperation Dialogue** to bring together Member States, regional and local authorities, industry stakeholders and civil society. It will aim to identify actionable solutions on further strengthening sustainability, connectivity, digitalisation, visitor flow management and resilience, in coordination with relevant EU maritime and ports initiatives[73].

[66] European Commission, 'A Long-Term Vision for the EU's Rural Areas', accessed November 2026.
[67] European Commission, 'EU Strategy on Resilient, Prosperous and Liveable Coastal Communities', COM(2026) 530 final, June 2026.
[68] European Commission, 'The European Ocean Pact', COM(2025) 281 final, June 2025.
[69] Eurostat, 'Nights Spent at Tourist Accommodation Establishments by NUTS 3 Region', Eurostat Database, accessed November 2026.
[70] Eurostat, 'Seasonality in the Tourist Accommodation Sector', Statistics Explained, accessed November 2026.
[71] European Parliament and Council of the European Union, 'Regulation (EU) 2025/925 of 7 May 2025 on a Mechanism to Resolve Legal and Administrative Obstacles in a Cross-Border Context', Official Journal of the European Union, 2025, accessed November 2026.
[72] European Commission, 'Affordable Housing Act', accessed November 2026.
[73] European Commission, Directorate-General for Maritime Affairs and Fisheries, 'Good Practices for Sustainable Cruise Tourism', Publications Office of the European Union, 2023, accessed November 2026.

Action area 6: The Commission will

- launch the development of a common **EU Model for Tourism Management,** as of 2027 in a collaborative process to support tourist destinations, and
- propose a draft **Council Recommendation on Balanced Tourism Management** and a common **EU Toolbox for Balanced Tourism** by 2027 to help destinations achieve beneficial tourist flows.

## 2.3 Advancing tourists' rights, affordability and inclusive tourism

The tourism sector's long-term sustainability also relies on improving accessibility, strengthening tourist's rights, and ensuring inclusive tourism. Strong consumer and passenger rights and their effective enforcement are crucial for sustaining and increasing Europe's attractiveness as a tourist destination. The recently revised **Air Passenger Rights Regulation**[74] will benefit tourists through improved protection in case of flight disruptions. It makes compensation rights clearer and requires airlines to proactively inform passengers about their right to compensation if they face delays, cancellations or miss their connection. It also introduces new rights, such as the right to self-rerouting (the right to book their own alternative travel arrangements) and ensures better enforceability of passenger rights. In addition, it will be easier for passengers to compare prices, as the revised Regulation requires airlines and platforms to display, by default, the cost of an airfare including hand luggage. To make life easier for air travellers, the Commission will explore ways of giving greater visibility to flights that allow more than 100 ml of liquids on board.

The revised **Package Travel Directive** will improve the protection of package travellers, reduce burdens for operators and clarify organisers' obligations[75]. The estimated gain for businesses is at least EUR 181.4 million from lower administrative costs per year across the EU[76], which should also benefit consumers. The upcoming revision of the Consumer Protection Cooperation Regulation[77] will strengthen the public enforcement of consumer rights, including tourists' rights, and contribute to a level-playing field for businesses in the tourism sector, including through direct EU-level enforcement powers in specific cases. For the public, the Commission will continue to maintain an **updated and easily accessible overview of tourists' rights** under existing EU legislation, including package traveller and passenger rights**,** in plain language and in all official languages of the EU[78]. This will support implementation and enforcement of core consumer rights in tourism and help businesses comply with EU law.

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[74] European Parliament and Council of the European Union, 'Regulation (EU) 2026/2202 of the European Parliament and of the Council of 16 September 2026 Amending Regulation (EC) No 261/2004 Establishing Common Rules on Compensation and Assistance to Passengers in the Event of Denied Boarding and of Cancellation or Long Delay of Flights and Council Regulation (EC) No 2027/97 on Air Carrier Liability in Respect of the Carriage of Passengers and Their Baggage by Air', Official Journal of the European Union, 2026.

[75] European Parliament and Council of the European Union, 'Directive (EU) 2026/1024 of the European Parliament and of the Council of 29 April 2026 Amending Directive (EU) 2015/2302 to Make the Protection of Travellers More Effective and to Simplify and Clarify Certain Aspects of That', Official Journal of the European Union, 2026.

[76] European Commission, 'Commission Staff Working Document: Impact Assessment Report Accompanying the Proposal for a Directive of the European Parliament and of the Council Amending Directive (EU) 2015/2302 to Make the Protection of Travellers More Effective and to Simplify and Clarify Certain Aspects of the Directive', SWD(2023) 906 final, 2023.

[77] European Parliament and Council of the European Union, 'Regulation (EU) 2017/2394 of 12 December 2017 on Cooperation between National Authorities Responsible for the Enforcement of Consumer Protection Laws and Repealing Regulation (EC) No 2006/2004', Official Journal of the European Union, 2017.

[78] European Union, 'Travel', Your Europe, accessed November 2026; European Commission, 'Passenger Rights Campaign', Directorate-General for Mobility and Transport, accessed November 2026.

**Affordability** is an important aspect of a well-functioning tourism ecosystem. Among EU residents not making tourism trips, 39% mention financial reasons as one of the reasons for not participating in tourism[79]. Affordability determines the ability of a broad range of consumers to access tourism services and destinations while helping sustain demand across the sector. It is therefore relevant both from a social and economic sustainability perspective[80], particularly when household purchasing power is under pressure. **Member States are encouraged to make use of existing best-practices on social tourism and related affordability schemes.**

Socially sustainable tourism must be inclusive, supporting visitors and local communities alike. Tourism businesses and destinations that apply 'design for all' principles offer benefits not only for persons with disabilities and reduced mobility, but also for older travellers and families with young children, and ultimately, for all travellers. Doing so can help develop year-round tourism opportunities and tap into the growing silver economy. The new **European Disability Card**[81] will give its holders legal certainty that their disability status will be recognised and that they will have equal access to special conditions and preferential treatments anywhere in the EU. Additionally, the Commission will provide **information on accessible tourism for tourism destinations and businesses** on the EU Tourism Platform, showcasing good practices and practical guidance and tools[82]. The Commission will also propose a **targeted revision of passenger rights legislation**[83] to make travel more accessible and predictable for persons with disabilities and persons with reduced mobility.

The Commission will explore with Member States and stakeholders whether the Women in Transport – Platform for Change[84] could serve as a model for a similar platform for the tourism sector. This would help support stakeholder cooperation and exchange of good practices on **gender equality in tourism**, in particular in senior or managerial roles. The Commission will also explore with stakeholders whether the **Network of Ambassadors for #DiversityInTransport**[85] could be extended to include tourism to raise awareness on equality issues in the transport dimension of tourism and support implementation of the Union of Equality Strategies[86].

**Cultural tourism is a major tourism segment** and a policy lever for regional development, heritage safeguarding, social inclusion, innovation and sustainability. Sustainable cultural tourism can help the EU shift from volume-based tourism towards a more value-led, resilient, place-sensitive, climate-conscious and socially balanced model. **For young people, DiscoverEU**[87] **offers opportunities to explore Europe's cultural diversity though educational, inclusive and sustainable cultural tourism.**

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[79] Eurostat, 'Persons Not Participating in Tourism by Reason and Sex', Eurostat Database, accessed November 2026.
[80] International Social Tourism Organisation (ISTO), 'Who We Are', accessed November 2026.
[81] European Parliament and Council of the European Union, 'Directive (EU) 2024/2841 of the European Parliament and of the Council of 23 October 2024 Establishing the European Disability Card and the European Parking Card for Persons with Disabilities', Official Journal of the European Union, 2024.
[82] European Commission, 'About AccessibleEU', AccessibleEU Resource Centre, accessed November 2026.
[83] European Commission, 'Passenger Rights: Targeted Revision of Rules to Better Address Needs of Persons with Disabilities and Reduced Mobility', Have Your Say, accessed November 2026.
[84] European Commission, 'Women in Transport – EU Platform for Change', Directorate-General for Mobility and Transport, accessed November 2026.
[85] European Commission, 'Diversity in Transport', Directorate-General for Mobility and Transport, accessed November 2026.
[86] European Commission, 'Gender Equality Strategy 2026–2030', COM(2026) 113 final; European Commission, 'Enhancing the Strategy for the Rights of Persons with Disabilities up to 2030', COM(2026) 541 final; European Commission, 'Union of Equality: LGBTIQ+ Equality Strategy 2026–2030', COM(2025) 725 final.
[87] European Commission, DiscoverEU, accessed November 2026.

Action area 7: The Commission will

- propose a **targeted revision of passenger rights legislation** by 2028 to improve accessibility for persons with disabilities and persons with reduced mobility, and
- set up a dedicated information point on **EU Tourists' Rights**, by 2027, and on **Accessible Tourism**, by 2028, as part of the EU Tourism Platform.

## 2.4 Strengthening resilience, crisis preparedness and responsiveness

Recent and ongoing geopolitical shocks together with rising risks from climate hazards, transport disruptions, cybersecurity incidents and public health emergencies, highlight the tourism ecosystem's exposure to crises and the need for preparedness and coordinated action. Tourism resilience is already supported by a wide range of EU preparedness, response and recovery instruments[88]. With regards to geo-political risks, the Commission acknowledges the specific situation of regions and islands with pressures on visitors due to negative impacts of geopolitical crises over security concerns and migration, and supports addressing their consequences, including by attracting visitors, rebuilding confidence and strengthening more resilient tourism models[89]. In this context, the EastInvest facility can play an important role in supporting the sector in the eastern border regions[90].

As crises will likely persist and new ones emerge, the **EU Tourism Crisis Coordination Network** will be established. It will bring together tourism crisis coordinators from the Commission, Member States and regions to exchange information, assess tourism-specific impacts and strengthen preparedness, including by drawing on relevant private-sector and international expertise. For example, the hospitality sector can contribute by building a network of **'safe heaven shelters'** offering shelter and support during crisis and emergencies. Rather than duplicating existing EU crisis coordination and preparedness mechanisms[91], the Network will complement them by ensuring that information reaches tourism authorities often not directly represented and by feeding tourism-specific impacts and needs into the wider cross-sectoral crisis preparedness and coordination.

Climate resilience is an integral part of tourism preparedness and responsiveness. The Commission will take advantage of the principles, provisions and tools of the **EU Framework for Climate Resilience**[92], such as the reference global warming trajectory, to make Europe's tourism sector climate-resilient by design. This also includes the Climate Insurance Alliance that aims to reduce the insurance protection gap also of the tourism sector. In the context of

[88] These include the Union Civil Protection Mechanism, the Preparedness Union Strategy, the Transport Contingency Plan, the Internal Market Emergency and Resilience Act, EU early warning and monitoring tools, and financial support such as the European Union Solidarity Fund and relevant State aid frameworks.

[89] European Commission, 'Commission Notice: Guidance Clarifying Certain EU Rules Applicable to Passengers and Tourism as Well as Transport Operators, Including in Light of the Current Reduced Supply of Jet Fuel from the Middle East', C/2026/2669, Official Journal of the European Union, May 2026;

[90] European Commission, 'Communication on the EU's Eastern Regions Bordering Russia, Belarus and Ukraine: Strong Regions for a Safe Europe', COM(2026) 82 final.

[91] European Commission, 'Proposal for a Regulation of the European Parliament and of the Council on the Union Civil Protection Mechanism and Union Support for Health Emergency Preparedness and Response, and Repealing Decision No 1313/2013/EU', COM(2025) 548 final, 2025, accessed November 2026; European Commission and High Representative of the Union for Foreign Affairs and Security Policy, 'Joint Communication to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions on the European Preparedness Union Strategy', JOIN(2025) 130 final, 2025, accessed November 2026.

[92] European Commission, 'A Resilient Europe for a Changing Climate: Communication on the EU Framework for Climate Resilience', COM(2026) 720 final.

wildfires, the Communication on integrated wildfire risk management[93] also encourages Member States to step up the collaboration between tourism stakeholders, farmers and foresters, local authorities, and fire safety experts to make visitors more risk aware. As announced in the State of the Union speech 2026, the Commission will present by 2027 a **European Heatwave Plan** that will also enhance the climate resilience of tourism.

Action area 8: The Commission will

- establish the **EU Tourism Crisis Coordination Network** by 2027 to better prepare for and respond to crises affecting specifically the tourism sector, and
- support Europe's tourism sector in advancing climate resilience by 2027, building on the **EU Framework for Climate Resilience**.

# 3 Enhancing international cooperation and outreach

Tourism is a powerful driver of closer connections, bringing people together across borders. The Strategy aims to strengthen the EU's global outreach and leadership in this sector by leveraging tourism more strategically as an instrument of the EU's external action and soft diplomacy. The Commission will **actively engage in international organisations and multilateral fora**, including the OECD, the United Nations and its specialised agencies, and relevant G20 and G7 platforms. The **Commission and UN Tourism will agree on a new Cooperation Framework** to jointly support competitive, sustainable and resilient tourism. The Commission will also strengthen bilateral and regional tourism cooperation with partner countries, including through new, **dedicated EU Tourism Dialogues and Fora**, such as the ones with EU-Gulf Cooperation Council (GCC) Forum, India and Japan, leveraging the experience from existing EU Transport Dialogues and, where relevant, broader international partnerships. These can support cooperation in areas of mutual interest, including sustainability and resilience, skills, digitalisation and connectivity, with particular attention to enlargement and neighbourhood countries. For instance, the Pact for the Mediterranean[94] boosts tourism by promoting sustainable development, cultural heritage preservation and cross-border collaboration to increase the region's appeal as a year-round destination. In addition, as part of the new Arctic Strategy[95], sustainable tourism can contribute to connectivity, local development and economic diversification.

Complementing these broader international partnerships, strengthening Europe's global position requires a clear and compelling narrative of what European tourism represents. To this end, the EU will strengthen joint visibility and branding efforts to bolster its position in global tourism markets. It will strengthen the **Destination Europe Framework** providing a European approach for coordinated promotion abroad that complements national, regional and local brands. Coordinated promotion will further contribute to diversifying source markets, reducing destinations' dependence on a limited number of them and support regions suffering from the impacts of geopolitical shocks. In the case of regions bordering Russia, Belarus and Ukraine, support is needed to address the impact of the reduced flow of international tourism over security concerns, including by attracting visitors, rebuilding confidence and strengthening more resilient tourism models, in line with the Eastern Border Regions Communication. As part of the Destination Europe Framework, the Commission will encourage **cooperation among regions across Europe to develop joint multi-destination itineraries such as**

[93] European Commission, 'Communication on Integrated Wildfire Risk Management', COM(2026) 330 final.
[94] European Commission, 'Pact for the Mediterranean', Directorate-General for the Middle East, North Africa and the Gulf, accessed November 2026.
[95] European Commission, 'EU Arctic Policy – Update', Have Your Say, accessed November 2026.

**European Discovery Routes**, in synergy with DiscoverEU Culture Routes and the European Heritage Label, that invite visitors to stay longer and discover lesser-known destinations.

Through its visa policy, the EU will continue to make legitimate travel easier, faster and more predictable for tourists and business travellers who need a visa to enter the EU in full respect of existing competences. In line with the **EU Visa Policy Strategy**[96]**,** the Commission will also explore the creation of a common list of verified companies for trusted business travellers. For travellers who do not need a visa to enter the EU, the **European Travel Information and Authorisation System** will make border checks more efficient.

Action area 9: The Commission will

- engage actively in **international organisations and multilateral fora**, including by agreeing on a **new Cooperation Framework between the Commission and UN Tourism** by 2027,
- organise dedicated **Tourism Dialogues and Fora** with key regions and partners, and
- enhance the **Destination Europe Framework** by 2028, providing a European approach for coordinated promotion abroad.

# 4 Ensuring investment, governance and cooperation

Investment and governance ensures enough support for the sector within an effective cooperation framework to deliver the Strategy's ambition.

## 4.1 Integrated tourism funding and investment framework

To turn this Strategy into reality, tourism needs continued investments. **Member States are invited to allocate sufficient national private and public investments to competitive, sustainable and resilient tourism,** taking into account the sector's investment gap and growth in tourism demand[97]. This also covers infrastructure needed for tourism (e.g. ports, marinas, train stations and waste management).

Under the EU's current Multi-annual Financial Framework (MFF) for 2021 to 2027, tourism benefits from 15 EU financing programmes. These include Cohesion Policy, the Recovery and Resilience Facility (RRF), Horizon Europe, the Single Market Programme, the Digital Europe Programme, the Common Agricultural Policy (CAP) LEADER instrument and Erasmus+. By the end of the period, **the sector is expected to have benefitted from an estimated EUR 18 billion in EU support**, mainly through the RRF (around EUR 13 billion) and the European Regional Development Fund (ERDF), including Interreg (EUR 3.7 billion; EUR 4.9 billion including national contributions)[98]. Under the RRF and ERDF, Member States and regions have included tourism measures covering infrastructure, competitiveness of tourism SMEs, smart destination platforms, innovative management models, digitalisation, resilience and skills. The RRF has also supported reforms of the legal framework for tourism, developing national, regional and local sustainable tourism strategies, and the operationalisation of DMOs, which play an essential enabling role for the effectiveness of investments. Under the Single Market

[96] European Commission, 'Communication from the Commission to the European Parliament and the Council on EU Visa Policy Strategy', COM(2026) 43 final.

[97] World Travel & Tourism Council (WTTC), 'Bridging the Gap: Travel & Tourism Capital Investment and Demand Growth Across the G20', accessed November 2026; OECD, 'OECD Tourism Trends and Policies 2026', OECD Publishing, Paris, 2026.

[98] European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, Transition Pathway for Tourism – Taking Stock of Progress by 2024, Publications Office of the European Union, 2025.

Programme, the Commission launched tourism-focused calls to support SMEs worth over EUR 48 million for 2021-2025. Other EU funding instruments, such as the European Maritime, Fisheries and Aquaculture Fund (EMFAF), have also supported tourism-related initiatives, notably through dedicated calls promoting sustainable maritime and coastal tourism in EU coastal and outermost regions.

In the short term, the **Member States, regions and tourism stakeholders can make use of funding still available under the MFF 2021-2027 to support competitive, sustainable and resilient tourism and related investments**. In the medium term, the design of the Commission's proposal for the MFF 2028-2034 offers an integrated and transversal funding perspective for tourism. It includes (i) Horizon Europe and the European Competitiveness Fund supporting research and innovation, support to SMEs, the clean transition and scaling up, including a specific reference to sustainable tourism, (ii) AgoraEU supporting culture, cultural and linguistic diversity and heritage and Erasmus+ supporting education and training development, (iii) EU-level financial instruments such as InvestEU[99], with support from implementing partners such as the European Bank for Reconstruction and Development (EBRD)[100], the European Investment Bank Group (EIB), including the European Investment Fund[101], explicitly recognising tourism and travel as relevant investment sectors, and (iv) the specific objective in the National and Regional Partnership Plans and Interreg Plan. **The MFF 2028-2034 is therefore a unique opportunity to channel funding along the pillars set out in this Strategy**, in particular on common priority investment areas (e.g. digital, innovation, environment and skills). Financial instruments could play a particularly significant role in harnessing private investment and involve local banks that are close to the reality of tourism SMEs.

**The Commission invites Member States to make the most of these funding opportunities that are expected to be made available under the 2028-2034 MFF to boost the competitiveness, sustainability and resilience of the tourism sector** considering the specific national and regional needs[102]. Getting these priorities right will also be supported by strengthening the assessment of economic and social impacts of tourism in the European Semester process, including the Country Reports. Moreover, **the Commission will support Member States and regions in designing tourism-related investments and reforms**, including through sharing of best practices of how to set up a project pipeline and use financial instruments to be impactful for SMEs.

The Commission has regularly published **guidance on access to funding for SMEs[103]**. In 2026, the Commission updated guidance on accessing EU funding. A practical toolkit of *dos* and *don'ts* helps SMEs identify funding opportunities and guide them through the application process. The platform's section on funding support and its practical tools will be regularly updated, including for the MFF 2028-2034. In addition to this hands-on guidance, the Commission will continue **providing local expert advice to tourism businesses via the Enterprise Europe Network[104]**.

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[99] European Commission, 'InvestEU', accessed November 2026.
[100] European Bank for Reconstruction and Development (EBRD), 'Real Estate and Tourism Projects', accessed November 2026.
[101] European Investment Fund (EIF), 'Home', accessed November 2026.
[102] To note that the scope and availability of such support will depend on the outcome of the ongoing MFF negotiations.
[103] European Commission, 'EU Guide Helps Tourism Stakeholders Navigate Funding for the Green and Digital Transition', accessed November 2026; European Commission, 'EU Funding and Businesses', Directorate-General for Mobility and Transport, accessed November 2026.
[104] European Commission, 'Tourism', Enterprise Europe Network, accessed November 2026.

## 4.2 An effective EU Tourism Cooperation Framework

The future vision for EU tourism as a joint and collaborative endeavour can only be delivered through a strong cooperation mechanism, overcoming operational fragmentation, while respecting the principle of subsidiarity. The Commission is committed to ensuring the effective implementation of this strategy jointly with all stakeholders. To this end, the Commission will launch a **high-level EU Tourism Alliance,** chaired by the responsible Commissioner, and representing the shared interests of the tourism ecosystem. The Alliance will bring together Member States, regions, local authorities, the private sector and the Commission. At its heart will be a set of workstreams covering this Strategy's main actions. These workstreams will be flexible and adaptable according to emerging needs and priorities, relying on specific project funding and governance as appropriate.

**The main objective of the Alliance will be to help steer the implementation of this Strategy and ensure synergies across its key actions**. By bringing together the existing EU tourism cooperation structures, notably the Tourism Advisory Committee (TAC)[105] and the Together for EU Tourism Expert Group (T4T)[106], with the implementation of the Strategy's action strands (e.g. EU Academy, EU Tourism Observatory, the EU Simplification Initiative), the Alliance will provide the legitimacy, scale and operational grounding needed to facilitate cooperation, identify challenges and potential solutions, and facilitate their uptake across the sector. **In 2027, the Commission will launch a call for interest for additional private sector representatives to participate in the Alliance.**

To ensure that the full variety of Europe's wider tourism ecosystem has a strong voice and can engage actively in EU tourism policymaking, the Alliance will include an online community open to individuals, civil society organisations, professional associations, businesses and other interested parties, hosted on the existing structures[107]. It will function as a sounding board for emerging trends and issues in European tourism and promote open discussion and shared intelligence on tourism policy and practice.

Cooperation extends beyond frameworks and should celebrate excellence. Since 2019, the European Capitals of Tourism initiative has recognised destinations for exceptional achievements in sustainable, accessible, digital and cultural tourism. It is time to take the Capitals initiative a significant step further to amplify the visibility of European destinations and the hidden gems for their excellence, embodying the best of what Europe has to offer. The Commission will prepare a proposal for a Decision of the European Parliament and the Council, for a new **European Capitals of Tourism Award**, drawing on the experience of the European Capitals of Culture. The Commission will strengthen the sustainable tourism dimension of European Capitals of Culture with relevant guidance to title holding cities.

To further strengthen cooperation across the sector, the Commission will also launch the first **Tourism Europe Days**, as a highly visible biennial flagship event which will be a unique meeting point to discuss topics related to tourism in Europe. It will bring together high-level politicians, financial institutions, industry representatives and tourism stakeholders to discuss specific measures and exchange best practices on developing competitive, sustainable and resilient tourism in Europe.

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[105] European Commission, 'Tourism Advisory Committee', Register of Commission Expert Groups and Other Similar Entities, accessed November 2026.
[106] European Commission, 'Together for EU Tourism – T4T', Register of Commission Expert Groups and Other Similar Entities, accessed November 2026.
[107] European Commission, 'Getting Started: Exploring the EU Tourism Platform's Home Page and Navigation', accessed November 2026.

Action area 10: The Commission will

- set up an **EU Tourism Alliance** by 2027 to streamline the variety of existing EU coordination and expert groups and help steer the implementation of this Strategy,
- **support Member States and regions in designing tourism-related investments and reforms**, including through sharing of best practices of how to set up a project pipeline and use financial instruments to be impactful for SMEs,
- continue developing local **expert advisory capacity in tourism** via the Enterprise Europe Network and other relevant initiatives,
- propose a new **European Capitals of Tourism Award** by 2027 based on the existing initiative, and
- launch the first **Tourism Europe Days** by 2027, as a highly visible biennial flagship event to further strengthen the cooperation across the tourism sector.

# The way forward – shaping the future of EU tourism

Europe's unmatched natural, cultural and territorial diversity is tourism's greatest asset. In turn, tourism is one of Europe's most powerful expressions of what it means to be a Union: welcoming, safe, competitive, sustainable, resilient and greater than the sum of its parts. This Strategy positions tourism as a key sector sustaining the EU's competitiveness, sustainability and resilience; a driver of mutual understanding, social cohesion and Europe's standing in the world.

The road ahead requires joint efforts at every level to respond to the challenges faced by Europe's tourism sector. Balancing tourism flows, closing skills gaps, embedding data and digital capabilities, ensuring inclusiveness and affordability as well as seamless connectivity, a high level of tourists' rights and turning environmental pressures into opportunities for innovation cannot be achieved in isolation. To ensure long-term sustainability of EU tourism in a world of recurring disruption, the ability to anticipate, absorb and recover from shocks is essential. This Strategy provides the framework in which all actors at all levels can act together with greater impact.

While Europe is the world's leading tourism destination, maintaining this status requires constant renewal. In an increasingly competitive global market, Europe must continue to distinguish itself through quality, sustainability, accessibility and authentic experiences. This Strategy gives the sector the voice, the visibility and the governance it needs, for visitors, businesses and local communities to reap tourism's full benefits.

EUROPEAN
COMMISSION

Brussels, 4.11.2026
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ANNEX

**ANNEX**

***to the***

**COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS**

**EU Sustainable Tourism Strategy**

{SWD(2026) 777 final}

**EU Sustainable Tourism Strategy – timing of actions**

| | |
|---|---|
| **Pillar 1 – Boosting the competitiveness of EU tourism** | |
| *Action area 1: Enabling SMEs to thrive: collaboration, simplification and growth* | |
| Launching an **EU Simplification Initiative** for tourism to gather practical evidence of the administrative burden faced by the tourism sector and destinations. | First half 2027 |
| Presenting in 2026 a proposal to **revise and modernise VAT rules applying to the travel and tourism sector.** | Second half 2026 |
| Launching focused **support to tourism SMEs** for their clean/digital transitions. | Second half 2027 |
| *Action area 2: Data, digitalisation and innovation* | |
| Support Member States to deploy the **Common European Tourism Data Space** to ensure access to high-quality, reliable data. | First half 2029 |
| Establishing an **EU Tourism Observatory** to monitor developments across the sector, analyse important trends and provide insights for EU policy. | First half 2027 |
| Facilitating **greater synergies among tourism start-ups and with investors**, including through matchmaking events. | First half 2027 |
| Proposing to **modernise Regulation (EU) 692/2011 concerning European statistics on tourism.** | Second half 2027 |
| *Action area 3: Skills and talent for tourism* | |
| Launching a high-quality **EU Tourism Academy** to provide the crucial training and talent development that the sector needs. | Second half 2027 |
| Publishing a **study on working conditions in tourism**. | Second half 2028 |
| *Action area 4: Seamless and sustainable connectivity and infrastructures* | |
| Proposing to **revise the Air Services Regulation** to make air travel in Europe more reliable, transparent and resilient, and have a fitness check of airport legislation. | Second half 2027 |
| Proposing **legislation for easier and more affordable use of rental cars across borders.** | Second half 2027 |
| Further strengthening the **attractiveness of rail mobility for tourism** by connecting railway and tourism stakeholders in **high-level events.** | Second half 2027 |
| Exploring solutions for **EU-wide interoperability of local transport ticketing systems** working with public transport authorities and associations. | First half 2028 |
| **Pillar 2 – Strengthening sustainability and building resilience** | |
| *Action area 5: Clean and circular transition* | |
| Support **tourism SMEs in applying relevant EU legislation and available tools related to the clean transition and climate action**, including by developing for SMEs a toolkit with guidance, offering training and capacity building actions. | Second half 2028 |
| Presenting renewed **EU Ecolabel criteria for Tourist Accommodation Services** to support more sustainable tourism business models. | Second half 2028 |

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| *Action area 6: EU Model for Tourism Management* | |
| Launching the development of a common **EU Model for Tourism Management** in a collaborative process to support tourist destinations. | Second half 2027 |
| Proposing a draft **Council Recommendation on Balanced Tourism Management** and a common **EU Toolbox for Balanced Tourism** to help destinations achieve beneficial tourist flows. | Second half 2027 |
| *Action area 7: Advancing tourists' rights, affordability and inclusive tourism* | |
| Proposing a **targeted revision of passenger rights legislation** to improve accessibility for persons with disabilities and persons with reduced mobility. | Second half 2028 |
| Setting up a dedicated information point on **EU Tourists' Rights** and on **Accessible Tourism** as part of the EU Tourism Platform. | First half 2027 and first half 2028 |
| *Action area 8: Strengthening resilience, crisis preparedness and responsiveness* | |
| Establishing the **EU Tourism Crisis Coordination Network** to better prepare for and respond to crises affecting specifically the tourism sector. | Second half 2027 |
| Supporting Europe's tourism sector in advancing climate resilience, building on the **EU Framework for Climate Resilience.** | Second half 2027 |
| **Pillar 3 – Enhancing international cooperation and outreach** *(Action area 9)* | |
| Engaging actively in **international organisations and multilateral fora**, including by agreeing on a **new Cooperation Framework between the Commission and UN Tourism.** | Ongoing |
| Organising dedicated **Tourism Dialogues and Fora** with key regions and partners. | Ongoing |
| Enhancing the **Destination Europe Framework**, providing a European approach for coordinated promotion abroad. | First half 2028 |
| **Ensuring investment, governance and cooperation** *(Action area 10)* | |
| Setting up an **EU Tourism Alliance** to streamline the variety of existing EU coordination and expert groups and help steer the implementation of this Strategy. | Second half 2027 |
| **Supporting Member States and regions in designing tourism-related investments and reforms**, including through sharing of best practices of how to set up a project pipeline and use financial instruments to be impactful for SMEs. | Ongoing |
| Continue developing local **expert advisory capacity in tourism** via the Enterprise Europe Network and other relevant initiatives. | Ongoing |
| Proposing a new **European Capitals of Tourism Award** based on the existing initiative. | Second half 2027 |
| Launching the first **Tourism Europe Days**, as a highly visible biennial flagship event to further strengthen the cooperation across the tourism sector. | Second half 2027 |