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FOR A NEW EU INTEGRATED TOURISM POLICY

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SUMMARY

1. INTRODUCTION

Tourism is a major economic activity with a broadly positive impact on economic growth and employment in Europe. It is also an increasingly important aspect in the life of European citizens, more and more of whom are travelling, either for leisure or business. As an activity which impinges on cultural and natural heritage and on traditions and contemporary cultures in the European Union, tourism provides a textbook example of the need to reconcile economic growth and sustainable development, including an ethical dimension. Tourism is also an important instrument for reinforcing Europe's image in the world, projecting our values and promoting the attractions of the European model, which is the result of centuries of cultural exchanges, linguistic diversity and creativity.

However and despite being one of the most relevant European economic sectors, tourism is not being address as such by the European Union (EU) government bodies since currently, there is just a shy EU tourism policy[1] under the excuse of "limitations" imposed by the article 195th of the Lisbon Treaty once these bodies "only" have a third level competence in this field (being able to complement, support and coordinate the action of the Member States but not to harmonize the Member States tourism laws).

Nevertheless, this is an important effort that is being work and updated since 1999, having as most important achievement the communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions "Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe" (COM(2010) 0352, of 30 June 2010). However, it should be pushed further as, presently, the European Commission (EC) is a mere facilitator in a sector where each country (competence) has its own tourism policy with separate rules, incentives and consequent national promotion initiatives worldwide, as well as proper definitions and standards of quality.

Tourism itself has become an increasingly complex phenomenon, with political, economic, social, cultural, educational, bio-physical, ecological and aesthetic dimensions. The achievement of a beneficial inter-action between the potentially conflicting expectations and aspirations of visitors and host or local communities, presents many challenges and opportunities.

On the other hand, if natural and cultural heritage, diversities and living cultures are major tourism attractions, the excessive or poorly-managed tourism and tourism related development can threaten their physical nature, integrity and significant characteristics. The ecological setting, culture and lifestyles of host communities may also be degraded, along with the visitor's experience of the place.

Tourism should bring benefits to host communities and provide an important means and motivation for them to care for and maintain their heritage and cultural practices.

Currently, to face all the dimensions and complexity of the tourism industry the EU has no Integrated Tourism Policy but only a set of principles and aims to which development Member States contribution can be supported, an unfortunate option, having in mind the growing economic and social importance of this sector, and potential in the relationship it has with the preservation and promotion of natural and cultural heritage.

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[1] Please see Annex 1.

The foundations for a European tourism policy had been set by the Lisbon Treaty and the EU, in cooperation with the Member States and associations representing the sector, has invested important efforts in implementing a series of actions intended to strengthen European tourism and its competitiveness. It should be seen as the first step which provides the necessary clarification and enables the setting up of a coherent framework for action, not yet active.

Now that EU is looking to its future, is preparing a set of new policies to be implemented, is preparing a new financial framework for 2021-27, it is the appropriate time to look at the tourism activity in a different way, creating an Integrated EU Tourism Policy and endow it with a proper budget, to be included - as such - in the future multiannual financial framework.

We believe now it is the appropriate time to look at what was done so far[2] and to identify what is needed to be done in future, organising and promoting a unique tourism destination – EUROPE.

The objective of this document is to contribute to the debate, showing briefly:

- WHAT IS THE STATE OF ART OF TOURISM POLICY IN EUROPE AND WORDWIDE?
- WHAT ARE THE MAIN REASONS FOR HAVING AN INTEGRATED TOURISM POLICY AT THE EU LEVEL?
- WHAT ARE THE DIFFERENT AIMS TO TAKE INTO ACCOUNT IN AN EU TOURISM POLICY?
- WHAT SHOULD BE THE TOURISM POLICY SUPPORTING INSTRUMENTS?

In addition, it is also presented some proposals for concrete actions and recommendations.

For this purpose, the document was structured in the following chapters:

- Chapter 1 – Introduction: In this chapter the reader will find a brief description of the document aim and contents;

- Chapter 2 – Why there is a need of an EU tourism policy: This chapter justifies and discuss the main reasons why a EU tourism policy is needed taking in to account not only the contribution of the tourism industry for Europe's wealth and welfare but also all the European Parliament and Commission papers on this issue;

- Chapter 3 – Main fields of intervention: In this chapter presented an overview of the main fields of intervention proposed to be addressed by a future EU tourism policy, presenting its relevance and impact upon tourism activity;

- Chapter 4 – Tourism policy supporting instruments: This chapter is divided in two different parts. In its first part it is described what was considered the main monitoring and decision-taking supporting tools. In the second part, it is justified the need of creating financial frame work to support the implementation of the EU tourism policy.

- Chapter 5 – Conclusions and recommendations: In this chapter it is discussed the main conclusions of the reflection promoted along the document as well as the main recommendations to be considered by the European policy makers when developing the new EU tourism policy.

- Chapter 6 – Executive summary: The last chapter of this document meant to be a clear and assertive summary of the document, highlighting its main features and findings and enabling a full understanding of the discussion made in a quick reading.

One last note to highlight that in the development of this document were used different sources of official information about the tourism industry in Europe. Many times, it was detected that for some variables (in the same period) different values are presented thus the option of the authors of the present report was to discuss the trends inherent to the figures obtained instead of the figures itself.

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[2] Please see Annex 1.

2. WHY THERE IS A NEED OF AN EU TOURISM POLICY

2.1 THE RELEVANCE OF THE TOURISM INDUSTRY FOR THE EUROPEAN UNION WEALTH AND WELFARE

For the EU, tourism is (and will continue to be) a growing industry in terms of GDP, employment and exports. Europe continues to be the number one tourism destination worldwide being a central pillar of the EU strategy for jobs and inclusive growth.

For 2018, the Word Travel and Tourism Council forecasts[3] for the European Union, in comparison with 2017, an increase of:

- The direct impact of the travel and tourism industry in the GDP of 2.6% (representing 4.2% of the EU's GDP);

- The total contribution of the travel and tourism industry in the GDP of 2.5% (representing 11.1% of the EU's GDP);

- The direct contribution of the travel and tourism industry to employment of 2% (being responsible for over 14 million jobs);

- The total contribution of the travel and tourism industry to employment of 1.8% (supporting over 31 million jobs);

- The visitor exports up to 3.4% (representing 6,3% of the EU's exports);

- The investment of travel and tourism industry of 4.5% (representing 5,6% of the EU's total capital investment).

These numbers are even more impressive in some specific sectors like costal and maritime tourism (one of the 5 focus areas of the EU Blue Growth Strategy). In Europe, costal and maritime tourism is employing over 3.2 million people, generating a total of EUR 183 billion in gross value added and representing over one third of the maritime economy as an whole. As much as 51% of bed capacity in hotels across Europe is concentrated in regions with a sea border.

Eurostat refers[4] that over 656 thousand tourist accommodation establishments active within the EU-28 in 2016 compose the industry offer. Altogether, they provided more than 31 million bed places. According with same source[5], the number of nights spent in tourist accommodation in the EU continued to grow in 2017 (5.2 %), reaching more than 3.1 billion nights.

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[3] https://www.wttc.org/-/media/files/reports/economic-impact-research/regions-2018/europeanunion2018.pdf

[4] https://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism_statistics#Bed_places_in_the_EU-28:_France_and_Spain_predominate

[3] https://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism_statistics_-_annual_results_for_the_accommodation_sector

In 2014, one in ten enterprises in the European non-financial business economy belonged to the tourism industries. These 2.3 million enterprises employed an estimated 12.3 million persons. Enterprises in industries with tourism related activities accounted for 9.1% of the persons employed in the whole non-financial business economy and 21.5 % of persons employed in the services sector. The tourism industries' shares in total turnover and value added at factor cost were relatively lower, with the tourism industries accounting for 3.7% of the turnover and 5.6 % of the value added of the non-financial business economy.

At the same time EU residents (over 15 years old) corresponds to 62% of the tourism demand in that year with around 1.2 billion trips (for personal or business purposes).

The majority (58.0%) of the total number of trips made were short trips of one to three nights while three quarters (74.4%) of all trips made were to domestic destinations, with the remainder abroad.

EU residents' trips for visiting another EU Member State as a destination had an average duration of one-week (7 nights) spending on average EUR 608 during those stays.

EU tourism trends report (April 2018)[6] states that in the European Union, tourism contributes 10% to EU GDP and creates jobs for 26 million people – through its direct, indirect and induced effects in the economy – in particular for young people, women and people from a migrant background.

Tourism represents 9% of total employment in the European Union. International tourism accounts for 6% of EU overall exports and 22% of services exports. Tourism ranks fourth as an export category, after chemicals, automotive products and food.

Within the EU, Southern and Mediterranean Europe is the most visited group of countries with 193 million arrivals in 2016, followed by Western Europe (171 million), Northern Europe (66 million) and Central and Eastern Europe (70 million). Five out of the top ten destinations in the world are located in the European Union: France, Spain, Italy, Germany and the United Kingdom.

EU destinations received 139 million arrivals from outside the Union, of which 56 million from European source markets outside the EU. They received 83 million arrivals from outside Europe, of which 39 million from the Americas, 33 million from Asia and the Pacific, 6 million from Africa and 5 million from the Middle East.

Europe is the world's largest source region for outbound tourism, generating an estimated 618 million arrivals, half of the world's total, in destinations worldwide in 2016. International tourism receipts reached euro 342 billion, representing 31% of worldwide tourism earnings. Four out of the top ten source markets in the world are located in the European Union: Germany, the United Kingdom, France and Italy.

The year of 2017 marks the eighth year in a row of sustained growth in Europe, the world's most visited region.

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[6] https://ec.europa.eu/growth/tools-databases/vto/content/2018-eu-tourism-trends-report

Source: UNWTO Tourism Highlights 2018 edition

Guests from Extra-EU source markets spent 137 million nights in EU accommodation establishments in 2016, and guests from interregional source markets, 276 million. The United States is the top source market outside the EU with 74 million nights, followed by Switzerland (44 million nights), the Russian Federation (32 million nights) and China (25 million nights).

40%	EU accounts for 40% of international tourist arrivals worldwide
31%	EU accounts for 31% of international tourism receipts
500 million	EU destinations welcomed half a billion international tourist arrivals in 2016
61%	of total arrivals to EU were for leisure, recreation and holiday purposes
55%	of international tourists travelled to EU destinations by air

Source: EU tourism trends report (April 2018)

France is the world's number one tourist destination in terms of international arrivals (83 million in 2016) and the fifth in international tourism receipts (euro 38 billion). Spain is third in arrivals (75 million) and second in receipts (euro 55 billion). Italy is fifth in arrivals (52 million) and seventh in receipts (euro 36 billion). The United Kingdom is sixth both in arrivals (36 million) and in receipts (euro 38 billion). Germany is seventh in arrivals (36 million) and eighth in receipts (euro 34 billion).

Traditionally, the advanced economies of Europe, the Americas and Asia and the Pacific have been the world's major source markets for international tourism. In recent decades, however, emerging economies in Asia, Central and Eastern Europe, the Middle East, Africa and Latin America have expanded rapidly and are increasingly driving tourism growth, thanks to rising levels of disposable income.

61%	EU accounts for 40% of international tourist arrivals worldwide
1,2 billion	EU accounts for 31% of international tourism receipts
74%	EU destinations welcomed half a billion international tourist arrivals in 2016
65%	of total arrivals to EU were for leisure, recreation and holiday purposes
€ 89 per night	of international tourists travelled to EU destinations by air

Source: EU tourism trends report (April 2018)

Like in most parts of the world, holidays, recreation and other forms of leisure are the main purposes for travel to EU destinations. International arrivals for these purposes represented 61% of total arrivals to EU destinations in 2016, somewhat above the world average of 57%. Some 15% of international tourists in the EU travelled for business and professional purposes, while another 24% travelled for other reasons such as visiting friends and relatives (VFR), religious reasons and pilgrimages, and health treatment.

EU destinations with its 608 thousand accommodation establishments in 2016 and a total capacity of 31 million bed-places (44% of which in hotels), generates around 1 billion guests who spent 3.1 billion nights.

EU destinations' accommodation establishments in 2016 are mostly small and medium-sized enterprises (SMEs). Eurostat classifies three types of establishments: 202 thousand (33%) were hotels and similar accommodation, 378 thousand (62%) were holiday and other short-stay accommodation (apartments, bungalows or chalets), and 28 thousand (5%) were camping grounds and recreational vehicle/trailer parks.

These accommodation establishments offered a total of 31 million bed-places. Hotels and similar establishments counted 14 million bed-places (44% of the total) in 6.7 million rooms. Per hotel there were 68 bed-places distributed in 33 rooms on average, or close to two bed-places per room on average. Hotel sizes vary considerably with many small often family-run businesses and comparatively few large ones: 60% of the total has less than 25 rooms, 32% has 25-99 rooms and the remaining 8% has 100 rooms or more.

Camping grounds and recreational vehicle/trailer parks had another 10 million bed-places on offer (32% of the total), or 351 bed-places per establishment on average. Holiday and other short-stay accommodation account for 8 million bed-places (24% of the total).

31 million	bed-places in 608 thousand accommodation establishments in the EU
44%	hotels account for 44% of total capacity in bed-places
3,1 billion	nights and 1 billion guest arrivals to establishments
3 nights	average of 3 nights per arrival at establishments

Source: EU tourism trends report (April 2018)

In most destinations in the world proximity is key when it comes to source markets. In the 28 European Union countries the large majority of international overnight visitors clearly originate from other countries within the Union. Of the 500 million international tourist arrivals welcomed in EU destinations in 2016, 361 million came from EU source markets (72%), while the remaining 139 million originated from extra-EU countries in Europe and from other regions (28%).

10%	tourism represents 10% of GDP of the European Union EU
12 million	people employed equivalent to 9% of EU employment
6%	of EU overall exports and 22% of services exports
€ 27 billion	surplus in the travel trade balance

Source: EU tourism trends report (April 2018)

Over the past century, tourism has experienced continued expansion and diversification to become one of the largest and fastest-growing economic sectors in the world. It is a key driver of socio-economic progress through the creation of jobs and enterprises, export revenues, and infrastructure development. Tourism is estimated to account for 10% of the world's gross domestic product (of which 3% direct, 5% indirect and 2% induced contribution) and one in ten jobs globally.

Tourism furthermore contributes significantly to the balance of payments, accounting for 6% of the EU's overall exports of goods and services and 22% of its services exports in 2016.

As a sector that has inter-linkages with virtually all other economic sectors, tourism produces profound and wide-ranging impacts across all dimensions of sustainable development. Thus, on the one hand, tourism offers significant opportunities as a tool for development, including the prospects it offers for rural areas and its potential to incentivize the conservation of environmental resources and cultural assets. On the other hand, it has multiple needs requiring targeted support at all levels to remain competitive in the face of increased competition from destinations outside the EU.

Tourism is also one of the greatest creators of inclusive employment because it employs many people in skilled and low-skilled jobs: if well planned and managed, tourism has the capacity to contribute to minimizing social divisions, thanks to its ability to create employment, even in disadvantaged sectors such as women and young people

Boosting investment, supporting SMEs, exploiting the opportunities of the digital economy and collaborative economy, and equipping tourism professionals with the right skills are only some of the areas that should concern the EU to go further in its growth and jobs objectives.

Tourism should be treated as a major European industry it already is and that can only be done through a specific European tourism policy.

2.2 BRIEF REFLEXION ABOUT THE ACTUAL EU'S TOURISM POLICY (REVIEW OF THE PARLIAMENT AND COMMISSION PAPERS ON TOURISM)[7]

Tourism enters in the EU agenda for the first time in mid-1990's became a priority for the EU institutions mainly because of the contribution of tourism to employment gains relevance. In 1999, the Commission wrote a communication on "Enhancing Tourism's Potential for Employment" [Com(99) 205 Final] which conclusions where included in the agenda of the Internal Market Council meeting highlighting the "importance of better integrating the needs of the tourism sector into other Community policies". At that time, the focus was to increase the coordination of initiatives and the promotion of synergies for exploiting the potential of tourism as a "job creator in Europe" aiming to reach 11,5 million jobs until 2009. This communication also highlights the tourism capacity to "ensure greater cohesion among European regions including the most peripheral areas of the Union" and, for the first time, states the supporting role the EU must have "in the establishment of conditions favourable to sustainable development in tourism".

The Commission (through this communication) also states the need of a coherent long-term strategy based on the "converge of views on enhancing of the competitiveness of European tourism in the interest of growth and employment" that should include "a multiannual tourism (framework) programme (...) which could allow the establishment of the main operational tools required" and that should ensure

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that "all stakeholders, whatever their level of responsibility, will be able to make their respective contributions through a system which would allow for open discussion on common objectives, the exchange of knowledge, encouragement of innovation and greater transparency and quality on planning and legislation".

In the same year, the Council of the European Union adopt the conclusions of the Commission recalling "the importance of better integrating the needs of the tourism sector into other Community policies" and asking to the Commission and the Member States "to work together closely within their respective spheres of competence, and with due regard to the principle of subsidiarity, in order to maximise, also in the context of other Community policies, the potential contribution of tourism to growth and employment"[8].

Following the results of the 1999 communication, namely the positive reaction of the Council, the parliament and Committee of Regions to this paper, the Commission issued a new communication proposing, for the first time, an operational framework and measures to boost the EU tourism industry. Under the title "Working Together for the Future of European Tourism", this communication envisages to take concrete actions to promote "sustainable, high-quality tourism and competitive European tourism businesses" [Com(2001) 665 Final].

A set of nine main actions were proposed:

- The incorporation of tourism in Community policies and measures;
- The consolidation of the new co-operation approach between tourism stakeholders through the open co-ordination method (namely through the strengthen of the EU Advisory Committee on Tourism, body created in 1986 by Council decision);
- The increase interaction with destinations and their representatives;
- The mobilisation of the existing competence and support centres for the development of knowledge and observation regarding tourism;
- The promotion of stakeholders' access to Community instruments;
- The development of satellite accounts for tourism and statistics;
- The establishment of an European Agenda 21 for tourism;
- The production of guidance documents (in especial, regarding the harmonisation of the accessibility criteria of sites for disabled people);
- The application of the tourism strategies and activities to the applying for membership and the consultation and close cooperation with other international bodies.

Overall, this paper aims at "consolidating, with the proactive commitment of those responsible for tourism activity in the EU, the new impetus for co-operation generated since 1999" calling once more for the cooperation of the European Parliament, the Economic and Social Committee and the Committee of the Regions.

In 2003, the Commission launched the "Basic orientations for the sustainability of European tourism" [Com(2003) 716 Fnal] which envisaged "several measures for strengthening the Community contribution to the sustainability of European tourism" and set the basis for the constitution of the Tourism Sustainability Group (responsible for drafting a detailed framework for action in the sustainable tourism field).

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[8] http://europa.eu/rapid/press-release_PRES-99-201_en.htm

In this paper, the Commission defines a set of measures to be taken as well as its own contribution for the development of a European sustainable tourism:

- To enhance the contribution of Community policies to the sustainability of European tourism;
- To encourage stakeholder synergies and co-operation;
- To assist the promotion of sustainable patterns of tourism consumption and production, and the better transfer of approaches, initiatives, instruments and good practice to the players on the ground.

It also calls for the contribution of other agents like the European citizens and tourists, the private sector and social partners, European destinations and public authorities, international organizations and national governments or even civil society groups.

Regarding this communication of the Commission the European Parliament issued a resolution "on new prospects and new challenges for sustainable European tourism" [P6_TA(2005)0335], welcoming the commission proposals and highlighting, among others, the need of:

- a better protection of the consumer rights in tourism sector;
- a "better coordination between Member States on the conditions of entry of third country nationals to EU territory so as to ensure a convergent approach towards tourist flows and their movement within the EU";
- "to improve the operation and awareness of the European emergency number 112";
- to address, in joint and collaborative way (by all tourism industry stakeholders) the seasonality problem and its consequences (in especial, the jobs insecurity);
- "to introduce co-ordination of the new Member States' tourism operators and public bodies into the networks and structures which exist at European level".

This paper also approaches one of the major problems of tourism (that remains until today): the "dangers of mass tourism which, in terms of the uncontrolled growth of transport and reception capacities and of seasonal fluxes [that] represents a threat to local natural and socio-economic balances".

It also the need of support through the Interreg programmes "cross-border initiatives which demand social cooperation, and which bind regions together (church/cultural tourism, pilgrimages, water tourism and so on)" despite recognising tourism as a policy that "falls within the competence of the Member States".

"A renewed EU Tourism Policy: Towards a stronger partnership for European Tourism" is the denomination of the 2006 Communication from the Commission. It concludes on the need of a cohesive policy response, at EU level, to face the challenges posed to European tourism. This response should be a European Tourism Policy "focused on clear and realistic goals, commonly shared by decision-makers, employers and employees, as well as by local populations. It should make the best use of available resources and take advantage of all possible synergies. It must build on the whole range of actions already carried out and must clearly offer added value to the national and regional policies and measures. Therefore any European tourism policy should be complementary to policies carried out in Member States" [Com(2006) 134 Final].

Here it was defined the main areas on which the EU tourism policy should focus on:

- Mainstreaming measures affecting tourism (better regulation at national and EU level, policy coordination and better use of the EU financial instruments by the tourism sector);
- Promoting tourism sustainability (mainly through the European Agenda 21 for tourism);
- Enhancing the understanding and the visibility of tourism (in especial, by promoting a better understanding of the European Tourism).

The main goal to be achieved with the implementation of the measures proposed in this communication is to "improve the competitiveness and demonstrate the importance of European tourism" through collaboration and partnerships (between all the tourism industry stakeholders, here included the EU bodies).

In 2007, a new Communication from the Commission was produced, officially launching and endorsing a medium-long term Agenda – the Agenda for a Sustainable and Competitive European Tourism – (the Agenda 21 for Tourism) "in which all stakeholders should undertake the necessary steps to strengthen the contribution of sustainable practices to facilitate the competitiveness of Europe as the most attractive tourism destination" [Com(2007) 621 Final].

The main concern driving this paper is to create "the right balance between the welfare of tourists, the needs of the natural and cultural environment and the development and competitiveness of destinations and businesses" (that is "deliver economic prosperity, social equity and cohesion and environmental and cultural protection").

This represents a shift in the approach to the tourism activity development (from a 'job creator industry' to the need to 'assure a sustainable conservation and management of natural and cultural resources' trough proper public policies).

In this context, the role of the European Commission was:

- To mobilize the actors to produce and share knowledge (in especial, aiming at improving the tourism SME's skills and competitiveness and supporting the creation of alliances between destinations and collaborative platforms and partnerships between the different tourism stakeholders, including the universities and research centres and the different levels of government);
- To promote destinations of excellence (mainly through the "European Destinations of Excellence" (EDEN) initiative);
- To mobilise the EU financial instruments (by "spreading of knowledge on how these existing EU financial instruments have been and can be used to this end by the different tourism stakeholders");
- To mainstream sustainability and competitiveness in his own policies (like the EU maritime policy, rural development policies or urban development policies).

Complementing the Agenda there are three other tools to promote sustainable tourism and foster sustainable behaviours of the tourism actors:

- the EU Ecolabel[9], a voluntary tool available to tourism accommodation services willing to build upon and promote their environmental performance;
- the EMAS[10] (Eco-management and Audit Scheme) registration, that allow actors in the tourism sector to improve their environmental policy learning platform on environment and resource efficiency;
- the ETIS[11] (European Tourism Indicators System) for sustainable destination management aiming at measuring the performance of tourist destinations in relation to sustainability.

After these two communication of the Commission the European Parliament published a resolution "on a renewed EU Tourism Policy: Towards a stronger partnership for European Tourism" focused on the relevance of the EU Visa policy for the European tourism development, the need for a "trustworthy,

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[9] http://ec.europa.eu/environment/ecolabel/

[10] http://ec.europa.eu/environment/emas/index_en.htm

[11] http://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators_en

homogeneous and up-to-date information on tourism", the need for the harmonization of the quality standards for tourism accommodation in Europe as well as for the implementation of quality and sustainability labels in the tourism industry and emphasises the importance of make tourism accessible to people with different disabilities [P6_TA(2007)0575].

In this paper, the European Parliament also highlighted the "the need for the new tourism policy to make European tourism sustainable in economic, social, territorial, environmental, and cultural terms" and asks for a "greater prominence [of the tourism industry] in the renewed Lisbon Strategy", welcoming the Commission initiative of creating the Agenda 21 for Tourism.

In 2008, the European Parliament made a resolution "on the regional development aspects of the impact of tourism on coastal regions" showing it preoccupation with the sustainable development of the coastal regional and the contribution tourism should ensure in this field, calling for an integrated approach to costal tourism in the context of the different EU policies (namely, the cohesion and maritime policies) [P6_TA(2008)0597].

In 2010, tourism is seen as a major economic activity in Europe but also (and despite of its resilience during the economic crises started in 2008) as an activity vulnerable to different types of phenomena (volcano eruptions, earthquakes, terrorist attacks, demographics …). It is also in place the Europe 2020 Strategy that define, as goal, that "Europe must remain the world's number 1 destination, [being] able to capitalise on its territorial wealth and diversity" [Com(2010) 352 Final].

To assure the accomplishment of this goal, the Commission issues a new communication aiming "to encourage a coordinated approach for initiatives linked to tourism and define a new framework for action to increase its competitiveness and its capacity for sustainable growth" [Com(2010) 352 Final].

Under the title "Europe, the world's Nº 1 tourist destination – a new political framework for tourism in Europe", this communication is admission that all-over the years the result of the EU initiatives was "a series of actions intended to strengthen European tourism and its competitiveness" and the "foundations for a European tourism policy" that is yet to come.

This is the first communication of the Commission under the Lisbon Treaty that, in its article 195th states the EU have competence "to support, coordinate and complement action by the Member States" in the field of tourism. It also empowers the EU to "develop an integrated approach to tourism, ensuring that the sector is taken into account in its other policies".

In line with the Lisbon Treaty (and the Madrid Declaration[12]) the Commission defined 4 priorities for the so called "new political framework for tourism":

- To stimulate competitiveness in the European tourism sector (diversifying the supply, developing innovation in the sector, improving professional skills, enlarging the tourism season and consolidating the socioeconomic knowledge base for tourism);

- To promote the development of sustainable, responsible and high-quality tourism (defining quality standards and sustainability indicators to be the bases of new promotional label and brands);

- To consolidate the image and profile of Europe as a collection of sustainable and high-quality destinations (especially among third countries as sources for tourism in Europe);

- To maximise the potential of EU financial policies and instruments for developing tourism (promoting a better integration of tourism in to the different EU policies aiming at "ensuring that the interests and needs of the tourism industry are fully taken into account when formulating and implementing its policies").

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[12] Declaration of the EU tourism ministers (April 2010) making recommendations and concrete proposal to the European Commission regarding a future EU tourism policy framework.

This communication also includes a set of 21 actions, planned to be carried out within the above-mentioned priorities.

Inconsequence, the European Parliament issues a resolution [P7_TA(2011)0407] welcoming the Commission initiative considering it as a "solid basis from which to develop an EU policy on competitive, modern, high-quality, sustainable tourism that is accessible to all" but calling for better coordination between the Directorates-General regarding tourism within the Commission and for the introduction of two new principles: 'interregionality' and 'complementarity' ("in order to promote joint planning and cooperation between tourist services within a single geographical area, i.e. either between neighbouring regions belonging to different Member States or at a specific thematic level between regions linked by common elements").

This recommendation of the European Parliament is of a major relevance for the development of cross-border tourism in the future.

On the other hand it also asks the Commission "to promote a specific initiative to harmonise gradually the accommodation classification systems (hotels, guesthouses, rented rooms, etc.) through the identification of common minimum criteria" and "welcomes the EU legislation on passenger rights"; to recognise the potential of the European industrial heritage for tourism as well as to properly support rural tourism and agrotourism; "to promote a cross-cutting Community initiative on the environmental impact of tourism"; to look carefully to the impact/planning of tourism in coastal regions (as principal tourism destinations in Europe); to not neglect the economic importance of shopping tourism.

The Parliament also asked, in this resolution, for a specific tourism programme for the multiannual financial framework 2014-2020 that was rejected by the Council.

In 2012, the commission issue a new communication that addresses one of the most relevant constraint to the growth of the third countries tourism markets – the visa policy.

The EU Visa Code in what refers to tourism aim to "untapped potential for growth from tourists from emerging markets" like Brasil, Russia, China or even India as the "visa facilitation has historically increased international tourist arrivals of affected markets by 5-25%" [Com(2012) 649 Final][13]. Industry sectors like cruise tourism will also be positively affected.

With the EU Visa Code it is expected to remove the main obstacles the tourism industry faces regarding third countries markets through the implementation harmonised visa issuing procedures.

The EU Visa Code is revisited by the Commission in 2018 (through the a communication named "Adapting the common visa policy to new challenges") as the "environment in which visa policy operates has drastically changed" requiring to balance the prevention of security risks and the risk of irregular migration to the EU with the need to keep this Code as a "toll to facilitate tourism and business" [Com(2018) 251 Final]. In particular, this communication proposes a "more streamlined visa procedures and [the facilitation of] short-term tourism [trips]".

In 2014, the commission gave particular attention to one tourism concrete sector: the costal and maritime tourism, proposing a specific European strategy to promote the growth and jobs in this sector (assuming it as a relevant part of the EU blue economy and "the largest maritime activity in Europe") [Com(2014) 86 Final].

This communication claims for an "ambitious policy framework" for the costal and maritime tourism and defines a list of actions to be implemented by itself as part of the above-mentioned strategy.

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[13] The impact of border controls in the tourism activity is analyzed also in 2016, in a communication of the Commission about the Schengen system and the Schengen Border Code due the phenomena of massive migration Europe is facing [COM(2016) 120 final].

In 2015, the European Parliament published a resolution on the "New challenges and concepts for the promotion of tourism in Europe" renewing the request "of creating a section within the next multiannual financial framework that is dedicated exclusively to tourism, on the grounds that tourism should be better recognised as an individual economic activity in terms of budget and actions, instead of being financed from the budgets of other policy areas" [P8_TA(2015)0391].

This resolution also called the Commission to present a new strategy for EU tourism to replace or update the 2010 communication as well as to find "a mechanism for effective coordination and cooperation in the sector" and to analyse "the advantages and disadvantages of setting the European Agency for Tourism".

The Parliament made also some considerations about a common brand for Europe as a destination and for Europe destinations in this paper. This issue is discussed taking in consideration the third countries markets potential.

Not less important, this paper points out the need that the "European tourism (…) make a transition from a model of quantitative growth to a qualitative model leading to steady and sustainable development" and calls for a wide discuss on "of how the EU can promote agreed quality standards for tourism services" as well as for the development of an European Tourism Indicators System ("to help tourism destinations to control, manage, evaluate and improve their performance in terms of sustainability").

Sharing economy and digitalization in the tourism industry are another two themes included in the resolution calling the Commission "to assess the economic and social impact of the sharing economy and its implications for the tourism industry, consumers, technology companies and public authorities" and "to continue to foster collaboration between public and private travel and tourism stakeholders in order to facilitate research on, and the adoption of, digital solutions by European companies".

In this year there were two relevant communications of the Commission with impact on tourism: one proposing "An Aviation Strategy for Europe" [COM(2015) 598 final] and other proposing "A Digital Single Market Strategy for Europe" [COM(2015) 192 final]. Both sectors are key for the tourism activity development as key enabling activities for untapped the tourism potential however the Aviation Strategy only mention 'tourism' once just to refer it as a part of the global economic impact of the EU aviation. The same happens regarding the Digital Single Market Strategy communication (despite the recommendations of the European Parliament): 'tourism' is mentioned one unique time to refer the growth tourism platforms and its impact on the traditional business model of the sector.

A similar situation is registered regarding the communication of the Commission of 2016 proposing "A European agenda for the collaborative economy" where we can count the word "tourist" twice: one to refer the 'tourist taxes' and other to refer 'protection of tourist' as one objective of the regulatory interventions at national level [COM(2016) 356 final]. This communication advocates for embracing the "benefits that new collaborative economy business models can bring" aiming at "supporting consumers, businesses and public authorities to engage confidently in the collaborative economy".

Also in 2016, the commission issues a new communication making recommendations for regulation in professional services [COM(2016) 820 final]. In the seven groups of professions that were selected (belonging to four key economic sectors: business services, construction, real estate and tourism) was the 'tourist guides'. This profession is regulated in 14 member-States "with quite some significant differences as to the intensity of the regulation".

The main recommendation emerging to all regulating Member States of this paper is to "consider the justification and proportionality of regulation of the [tourist guides] profession".

In 2017 is published a new communication of the Commission about the blue economy in the western Mediterranean [COM(2017) 183 final]. It includes concrete actions for the maritime and costal tourism in this part of the EU (namely the development of new theme-based tourist products and services.

In 2018, the Commission issues a new communication in an area with deep importance for tourism – the cultural sector. This new communication presents "A New European Agenda for Culture" where tourism is one of the sectors enriched by combining skills and knowledge with culture and both industries are seen as "powerful drivers of the economic activity" [COM(2018) 267 final].

In this paper, the Commission states its will of "continue to support regions implementing Smart Specialisation and macro-regional strategies focused on culture and promote sustainable cultural tourism through a dedicated European initiative in the European Year".

The European Framework for Action on Cultural Heritage [SWD(2018) 491 final] includes in its actions to balance the access to cultural heritage with sustainable cultural tourism and natural heritage ("to balance the sustainability of cultural heritage with the benefits of tourism, not just in economic terms, but also for the well-being of local communities").

This overall review of the European Parliament and Commission papers allows to conclude that the efforts of the EU institutions are focused in maintaining Europe's standing as a leading destination while maximising the industry's contribution to growth and employment and promoting cooperation between EU countries, particularly through the exchange of good practice.

However, and despite the evolution the Lisbon Treaty[14] represents in the recognition of the importance of the tourism Industry for Europe's economy and jobs creation, there were no significant advancement since 2001, in the conceptualization and approach defined for the European tourism.

In fact, the major advancement since then is the recognition that the tourism industry in the EU should be developed not only to be competitive in the global market but also sustainable regarding natural and cultural heritage and resources and, above all, regarding the local communities of the touristic places.

In this context, the Agenda for a sustainable and competitive European tourism[15] is the main EU strategic document on sustainable tourism.

In the recent years it is 'complemented' with the assumption of cultural heritage as a fundamental resource/attraction of the European tourism activity, paradoxically more evident in the cultural policy documents than in the tourism policy ones[16], where it is called for the identification of ways to create a European tourism offer based on cultural heritage assets and for the need of exploring how digitisation of cultural contents and digital services can foster the expansion of trans-European tourism networks.

This is even more evident in the 2014-2020 Growth and Jobs programmes, which support investments in sustainable use and protection of nature assuming that those investment have at the same time many spill-over effects on tourism and within the COSME programme, as EASME supports the promotion and development of transnational thematic tourism products linked to cultural and creative industries.

In a less evident way, the same happens regarding natural heritage as LIFE programme thematic priorities on resource efficiency, green and circular economy are also suitable for the nexus between natural heritage and sustainable tourism. Similarly, the Natural Capital Financing Facility (NCFF), supports natural capital investments that can generate revenues and save costs, among which investments in eco-tourism.

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[14] Title XXII of the Lisbon Treaty is dedicated to Tourism. The article 195 establishes that "the European Parliament and the Council, acting in accordance with the ordinary legislative procedure, shall establish specific measures to complement actions within the Member States to achieve the objectives referred to in this Article, excluding any harmonisation of the laws and regulations of the Member States".

[15] [Com(2007) 621 Final]

[16] Namely, the EU Work Plan for Culture 2015-2018 (http://data.consilium.europa.eu/doc/document/ST-16094-2014-INIT/en/pdf) and the New European Agenda for Culture [COM(2018) 267 final].

In fact, the European Commission understand tourism not as industry (in strict sense) but a transversal activity that impacts/supports other industries and development aims as it stands out of "The Guide on EU Funding for the Tourism Sector, 2014-2020"[17].

By its side, the European Parliament is much more ambitious than the Commission[18] regarding the development of the European tourism industry asking for fundamental instruments for gathering an efficient tourism policy at the European level: the creation of an European Agency for Tourism as well as of a multiannual framework programme for this industry.

2.3 MAIN REASONS FOR HAVING AN INTEGRATED TOURISM POLICY

As already shown, tourism[19] is a growing industry that has assumed a key-role in the EU's economy and in the global economic activity. However, as its relevance grows, the industry faces new and more complex challenges like being one of them the "complexity of the tourism policy development due to its cross-cutting multi-level, and fragmented nature, and competing policy priorities and budgetary constraints" (OECD, 2018).

This complexity cannot be an excuse for joining efforts to move forward to a truly integrated and coherent tourism policy that reflects the circumstances of individual countries and local communities and supports the pursuit of common and shared goals (OECD, 2018).

Several studies and reports show that the majority of the Member States have specific tourism policies and long-term strategies with similar priorities and goals (like sustainability, competitiveness, seasonality reduction, quality and differentiation of the tourism experience offered, among others).

These similarities and shared vision represent a solid base for the development of a future EU integrated policy that answers to the tourism industry evolution and increasing competitiveness.

It is important to highlight, at this point, that an integrated tourism policy should be design for the Member States evolving in that process the private sector, non-for-profit agencies and other bodies that, at different levels, can influence the tourism activity performance and impacts.

To keep Europe as the first world tourist destination in the world is a goal share for all the Member States and tourism stakeholders as well as all these actors agreed on the relevance and uniqueness of the European historic, cultural and natural heritage that shall be exploited in a sustainable and organised way for the benefit of its citizens.

However, and despite the identification and study of the key-factors of a sustainable tourism development made, along the years by the European Commission and the European Parliament, the EU's tourism industry continues to be only the sum of the member States tourism industries which individual strategies are in the great majority of cases are competitive with each other.

There is still missing the definition of a value proposition for 'destination Europe' as whole and the website www.visiteurope.com is a repository of the individual touristic information of the members States and of the "more touristic" regions in the EU with no reference to its emblematic transnational and cross-border tourism packages.

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[17] https://publications.europa.eu/en/publication-detail/-/publication/e0707433-aa5f-11e6-aab7-01aa75ed71a1.

[18] https://aer.eu/wp-content/uploads/2018/05/Major-challenges-for-EU-tourism-and-policy-response.pdf

[19] Please see Annex 4 (WTO definition).

There is no brand strategy or destination communication strategy. There is no EU tourism label of quality. Tourism accommodation classification is not harmonized. Despite the creation of ETIS, countries statistics are not based on the same variables and units and because of that the EU statistics are still not reflecting the overall reality of this sector. On the other hand, European statistic does not measure socio-economic impact of tourism on territories, in general, and in the cross-border areas of the EU, in particular.

European Commission is taking interesting initiatives seeking for a competitive modern and sustainable tourism like those mentioned in the previous chapter and in Annex 1, but they are still not enough.

By its side, the European Parliament identifies the major challenges European tourism is facing, calling for concrete actions from the Commission side, aiming to assure the general goals the Commission states in the strategic documents issue on tourism and currently in force[20]:

- **Sustainability** both as horizontal principle to be achieved by all tourism stakeholders as well as in specific aims like: transports, massive tourism, global warming, natural and cultural heritage usage as tourism assets[21], spatial planning of the tourism activities;

- **Policy instability** resulting from economic crises, national government changes (in especial those that mean a shift for Eurosceptic political approaches), the Brexit, or other factors like terrorism attacks or the Arab Spring;

- **Worldwide tourism industry** (aggressive) **competition**, in especial with the entrance of new non-European markets[22] that are damaging from the EU tourist providers to engage in upgrading the quality of their products and services (improving and enriching them, or inventing new ones, in order to maintain their share in the global market) as well as a big effort in finding new strategies and approaches to extend the tourist season;

- Change of the tourist profile, which are leading to the **emergence of new niche target groups** like, for example seniors, LGBT persons or 'green' (environmentally friendly) tourist;

- The balance between easy **short-stay visa facilitation** procedures[23] and the response to illegal/massive migration phenomena;

- **Digitalization and regulation of online services**, that are generating a deep change on the tourism business models and introducing new 'agents' in the industry (namely trough the facilitation of sharing economy activities/new peer-to-peer services) as well as in the privacy and data personal storage and use;

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[20] "Europe, the world's No 1 destination – a new political framework for tourism in Europe" [COM(2010) 352 Final] and "A European strategy for more growth and jobs in coastal and maritime tourism" [COM(2014) 86 Final].

[21] Please note that the relationship between tourism and cultural and natural heritage goes behind the mere 'usage' of the heritage as tourism experience 'raw material'. As state by the High Level Group on Tourism and Employment (European Commission, 1998) there are "three levels of influence of the natural and cultural environment on employment" in the tourism sector:

1. "Safeguarding existing jobs through quality assurance for an ecologically intact environment at holiday locations"
2. "Creating new jobs through investment in ecological modernization and quality programmes, mainly at holiday resorts"
3. "Developing the basis for revitalizing or launching new professions in complementary services, including traditional crafts"

[22] World Tourism Organization (UNWTO) data shows that the EU is expected to maintain its market position as the top receiving destination in the next decade, but it will meet severe challenges on the way, as its share is forecasted to fall from 60 % in 1995 to 41% in 2030.

[23] According to a 2013 Commission study on the economic impact of short-stay visa facilitation on the tourism industry, in 2012 alone, the EU lost a total of 6.6 million potential travellers from China, India, Russia, Saudi Arabia, South Africa and Ukraine due to visa application difficulties.

- **Local and regional administrations** competences in terms of strategic planning and management of tourism side-effects must also increase to properly support a sustainable, high quality and competitive local/regional tourism development[24].

None of these priorities is being developed at/for the European context as a whole and the results accomplish are only experimented at the national level (with different degrees of success). So far, the so-called 'integrated approach' is understood as the involvement of all tourism actors in the definition of national/regional policies and action plans forgetting the need of 'integrate' under the EU umbrella all 28 national tourism policies and strategies. This last integration concept should be seen as a consequence of the openness and bet on attracting tourists from third countries, a necessity resulting from the development of 'destination Europe' and, above all, an imposition derived from the current characteristics of the tourism industry.

At the European context, other challenges and priorities are raising (and remaining unaddressed by the EU bodies). One of these challenges is the development of cross-border tourism[25] which demands supra-national strategies and policies in relevant aims for the EU like, for instance, sustainability and integration of cross-border/shared cultural and natural assets, cross-border and transnational tourism products sell and promotion or cultural itineraries and other cross-border/European routes touristic management.

Like any other economic important sector, EU tourism should be addressed in a more aggressive and integrated way. The European Commission should have the legal means to prepare an integrated tourism policy addressing the concrete aims identified as contributor to the sustainable development of any tourist destination (value proposal, long-term vision, strategic priorities, brand and communication strategy, portfolio development, etc.) and with appropriate financial resources to implement it and to support European tourism actors in this implementation.

On the other hand, countries share a set of problems that need also to be addressed at the European level (using an integrated approach and cohesive framework) like:

- Impact of massive tourism in cultural and natural heritage and in urban areas;

- The sharing economy impact on tourism development that demand for a specific legislation aiming to balance the change of the business models and profile of the tourism agents and the increasing conflicts with local communities and traditional stakeholders;

- The globalization of the local tourism products and services offer facing a worldwide demand (without the need increase of the skills and competences of the tourism agents).

So, despite being a vibrant economic sector, it still lacks a cohesive framework of full-fledged EU actions and policies. For the time being, tourism does not constitute a major Commission policy priority and

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[24] A challenge is posed by the fact that various local and regional economies may become extremely dependent on tourism (a trend known as 'tourism monoculture'). Diversification of the locally offered tourist product with parallel activities, such as agriculture or the creation of local products, may help to fight this trend. The promotion of alternative forms of tourism that help create a host of new activities and professional qualifications may be a form of diversification of the local/regional economic sectors.

[25] EU has a unique common Cultural and Natural Heritage, but often in cross border areas (land and maritime – EU has 8 maritime natural borders) the nations forget to invest there for the preservation and protection of these assets. This more evident when we are talking about peripheral cross border areas of the UE. In these areas, populations are leaving these territories to search for a better life. Tourism can be a driver to fix populations, creating jobs and growth, and in a sustainable way protect, preserve and boost awareness of this Heritage.

while various EU funds can be used to support tourism-related activities, there is no EU funding axis dedicated to tourism. Although Europe remains a competitive tourist destination, it is gradually losing ground to other markets. This trend is expected to grow in the coming years. It remains to be seen whether additional actions will be adopted on behalf of the EU in order for Europe to maintain its prestigious predominance in the field.

UNWTO's long-term outlook *Tourism Towards 2030* shows that there is still a substantial potential for further tourism growth in the EU in the coming decades. International arrivals to EU destinations are expected to increase by an average of 9 million a year through 2030 (+1.9% a year), with faster growth from source markets outside the EU. We strongly believe this potential only will be untapped if the EU starts to see the European tourism industry as a key economic sector and not as a complementary activity to the major socio-economic sectors.

3. MAIN FIELDS OF INTERVENTION

As detailed in the previous chapters, tourism has inter-linkages with virtually all other economic sectors and has a great influence in the social sector as well as upon local communities' way of life and welfare. In general, tourism produces profound and wide-ranging impacts across all dimensions of sustainable development that must be take into account when defining an European tourism policy.

As also explained, it is saw as a major contributor to growth and jobs all-over the Europe but not treated as the other relevant European economic sectors: as an industry (strict sense) with specificities which needed to be addressed with direct measures and developed through a dedicated strategy that covers all its dimensions and agents.

Unfortunately, at the European Union level, several of the tourism dimensions are addressed through other sectors (like culture, transports or ICT) and under a set of principles and aims designed not to contribute to development of tourism sector but just to support Member States in the development of their own tourism activity.

In this context and in order to contribute to a wider reflexion For a New EU Integrated Tourism Policy, in the next sections it is proposed an analysis of the main fields an integrated EU Tourism Policy should tackle.

3.1 CULTURAL HERITAGE

It is undeniable the relevance and reciprocity between cultural sector and tourism industry development and it is clearly recognised in the strategic documents the EU had already in force for the sustainable development of the European culture (like, for example, the "new European agenda for culture").

However, to build a tourism policy for the EU it is needed to reverse current approach of the EU, meaning being necessary to think how tourism can 'use' cultural heritage instead of consider tourism just as supporting tool for the cultural sector sustainable development.

In this context, tourism development requires to rethink the cultural heritage management (always bearing in mind the need to promote the exploitation of these assets in a sustainable way) to be part of the touristic experience to be offered by the destination. Simple thinks like heritage visiting hours and access; storytelling and added value information availability; integration in broader networks; among others, can make the difference when attracting new audiences, promoting the enlargement of touristic stays or acting to achieve deseasonalization.

The interests of tourism and cultural agents should not be seen as contradictory and the activities of those agents should be concerted. For example, in the aim of the protection of cultural heritage (a sensitive subject for the development of both activities), visitors massification is a problem for both of them: for the cultural agents is key to prevent risks of deterioration of the assets and for tourist agents

is key to assure the quality of the experience and this should lead to the definition of consensual rules when establishing cargo capacity of sites or monuments. In the same way, for both groups its fundamental to assure the preservation of immaterial heritage and prevent phenomena like the 'internationalization' of key identity assets like traditional gastronomy or festivals.

There are also obvious synergies between the two sectors that should be exploited under new perspectives. In special, cultural itineraries and cultural European networks: assuming this itineraries and networks have as main objective the preservation, valorisation and promotion of the cultural assets that are shared, common and/or related; they represent valuable contents for unique and differentiating experiences.

However, if tourism can be part of all networks and itineraries sustainable development strategies, not all cultural networks and itineraries accomplish the requisites to be or be part of tourism products/experiences. To be part of it, is important to know tourists' behaviours and profiles[26] and the relevance of accomplish with their expectations and desires generated in the moment of the "purchase": "old can be attractive if presented in a modern, interactive and dynamic way".

Labels are also a critical factor for the tourism industry once they can be developed as an added value brand in promotion and communication. Culture labels like 'world heritage', 'European festivals label'[27] or 'European heritage label'[28] are differentiation factors in the tourism competitive global market and central elements in the construction of transnational tourism products.

Adding to these labels (specific for cultural heritage), other labels designed explicitly for tourism like 'EDEN' Destinations (European Destination of Excellency) or the category 'cultural heritage and creativity' of the European Smart Tourism Award are based on the sustainable incorporation of cultural assets in the tourism activity and can also represent a competitive advantage in the mentioned market.

Culture represents a field of opportunities for tourism and vice-versa[29]. Tourism increases the potential for local and national economic development since it can be a source of many types of financial gain: entrance fees to sites and museums, guided tours, sales of handcrafts (development of the craft industry) and documents and photos. Culture untapped the attraction potential of territories unlikely to be considered 'touristic destination' increasing revenues (in same cases developing) of the hospitality industry, transportation, restaurant services or local taxes.

But, in several ways, they can represent problems and obstacles for each other development and the basic rules and strategies for conciliating interests should be promoted at the European level, contributing to the construction of the 'destination Europe'.

At the European level, it is important to map the different types of cultural heritage and centralise the information about cultural heritage assets of the European Union (improving tools like www.europeana.eu), making it available for tourists (as potential interest sites/activities to know) and for tourism agents (to be used in the creation of new tourism products and offers). The same mapping is needed for cultural events like summer festival, concerts, musicals, and others, once they target specific audiences and can be further developed, if integrated in a network capable of reaching a broader public.

It is also important to define, at that same level, quality criteria and uses limitation to assure the compatibility of the two activities. It should be clear if one specific cultural heritage element can or not be used by the tourism activity the same way protected landscape has limited usages in some of its parts.

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[26] Cultural tourists are well-educated, highly educated and cultured audience and is more expensive than leisure tourism.

[27] https://www.festivalfinder.eu/effe-label

[28] Please see annex 5.

[29] Please see annex 6.

A similar situation occurs with the European natural heritage as the same level of relevance and reciprocity is registered between nature and tourism industry development and this relationship is recognised by the EU in its common policy - Natura 2000 -, the most important worldwide policy in preservation of natural environment (with different regulations concerning protection of sites, water supply, sewage treatment and waste collection and treatment).

Natura 2000[30] and Natura 2000 spaces network are also important labels for tourism which added value is to be guaranty of preserved and sustainable natural places where human activities are controlled.

However, if natural heritage has a well-developed and settled EU policy when talking about its management and its relationship with the tourism activity, most of the approaches understand cultural and natural heritage as a single unit without take into account the differences between the needs and interests of "nature tourist" and the "cultural tourist".

There are also to be considered the different types of tourism activities that can be done in the nature: sports; walking and cycling; fishing and hunting; camping; fauna and flora observation; all of them with different impact upon the natural heritage and targeting different typologies of tourists (generating different demands and different kinds of experiences).

This set of activities come along with a set of nature tourism products: eco-tourism, wine tourism, agritourism, birdwatching/wildlife tourism, safaris, nautical tourism, etc.

On the other hand, the compatibilization of the action of tourism and environmental agents seems to be more difficult than with cultural agents, in special because environmental actors are far more exigent imposing several use limitations that mandatorily means "no tourism activity allowed" but as in the previous case, there are a significant set of interests that are common for both sides (massification, for example, is also a common challenge both agents have to address to avoid the loss of the assets and to assure the quality of the experience). In this sense, consensual rules should be defined in terms of sustainability of touristic natural areas/sites.

At the EU level, natural heritage that are not Natura 2000 is forgotten not only at the protection and preservation level but also at the supporting programmes level. This non-protected heritage is a propitious field for conflicts between environmentalists, local communities, tourism agents and tourists representing a neglected field of intervention in what concerns tourism strategies and policies (this is also true for the regional and local level).

The future tourism policy must have all these specificities into account acting not only in aims like protection and preservation of the natural assets - under the tourism activity point of view -, but also aims like the sustainability of the tourism activity (monitoring impacts and correcting, on time, eventual negative externalities), assuring the consistency, continuity and quality of the nature touristic experiences. Assuring an environmentally friendly behaviour from both tourism agents and tourists is another aim that should concern an European tourism policy.

As it occurs with culture, tourism can capture the economic characteristics of the heritage and harness these for conservation by generating funding, educating the community and influencing policy. It is an essential part of many national and regional economies and can be an important factor in development, when managed successfully.

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[30] https://www.natura2000branding.eu

Cross-border tourism is another neglected field by the EU policies not only at the tourism level but also by the cultural and natural policies where no measures are taken to assure an integrated management of the shared/common assets.

Since earliest times and for long periods of history, borders were battlefields, and because of new configuration of modern states, these territories were given less attention from the national authorities. Border EU regions are mostly peripheral regions facing relevant costs of context and locations far from the political decision centres. Unfortunately, because of this, they share characteristics like high unemployment, lack of development conditions and lack of investment.

At the European level and when thinking the tourism development, borders are "non-issue". Borders are not seen as an attraction by itself, despite the possibility to develop (and present) them as gateways to another culture, language or way of life.

There is a huge unexploited potential borders can offer to build new tourism experiences and products related with similar languages spoken, shared culture and common natural heritage, shared history or common traditions.

At the cross-border cooperation level, cultural and natural heritage represent assets that ensure border cohesion as well as added value for the promotion and differentiation of the border regions. But, despite of that, EU institutions are not paying attention to the tourism potential to promote territorial cohesion (building a social cohesion sense within Europe).

Border regions remain unexplored as tourism destinations that main differentiating factor is the border itself as element that shaped, along the years, ways of live and identities. Transboundary tourism products and share attractions along with the possibility of knowing two or more countries in the same visit can redefine tourist preferences.

For border territories, tourism development can mean also an opportunity for attracting talents and improve local cultural sector (including creative industries) as well as increase the entrepreneurship capacity and set the conditions to the creation of new business[31].

Through its cultural, historical, ethnographic, natural and socio-economic values, the border regions can become relevant for tourism thanks to the originality of their offer and to the possibility of generating a new brand for tourism in EU. Therefore, with proper support , tourism can emerge as the main cross-border tool to deploy the cultural and natural heritage potential for these regions' development.

An EU Integrated Tourism Policy should tackle cross-border tourism as one of its priority once it can be developed as a competitiveness factor for Europe as a tourism destination. It should be the first promoter of continuous product improvement and innovation (which is central to the border tourism competitiveness) take in to account cross-border tourism products are complex and should encompassing the total experience of visitors from the stage of initial interest in a potential border destination, to decision to visit, the making of travel arrangements, local engagement and return home.

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[31] As an example, please read the report "Project stories from the Central Europe Program – Cultural Heritage and Creative resources" which offer us a perspective on how important heritage is for the development and attractivity of cross border areas (https://www.oerok.gv.at/fileadmin/Bilder/4.Reiter-Contact_Point/Central_Europe/PORTRAITS_Cultural-Heritage.pdf).

[32] It should be highlighted that, although sharing problems to overcome and investment needs, border regions all over Europe present are at different development stages and some of them still need to improve physical infrastructures (lack of gas, electricity, lack current water, sewerage,…; lack of accessibilities and public transports, among others) without which the tourism potential of these areas cannot be deployed.

No other continent has the possibility to present cross-border tourism destinations as consistence and experiential as Europe and no one like the EU can support these destinations development within common parameters (that are been developed through the Interreg A programmes for a long time).

3.4 INTERNAL MARKET

EU market is of outmost importance for tourism activities, as shown in figures mentioned in chapter 2.1 (relevance or the tourism industry for the EU wealth and welfare).

However, an additional effort has to be done in what concerns the promotion of tourism targeting EU citizens, in a better and organised manner creating in these citizens, at the same time, a sense of heritage common appropriation and a sense of European citizenship (avoiding the raise of new nationalisms against the European ideal).

It is also important to assure a smart use of the data and information generated by the different research and data centres of the EU (namely the European Commission Virtual Tourism Observatory) to manage the European residents' tourism flows in order to reduce seasonality as well as promote real territorial cohesion once Europe is the first-choice destination of European citizens (and mainly base on proximity).

European tourists are resilient in choosing Europe to travel (despite, for example, the terrorist attacks suffered by the main EU touristic cities). On the other hand, they are more technological every day using mobile devises and apps in all the steps of the travel arrangements (before, during and after their trips and stays)[33].

Thus, internal market tourism should be addressed in an integrated way with other fields of intervention of the tourism policy, namely: mobility and transports; technological innovation or digitalization.

In this context, a future tourism policy should define strategic priorities to address this target group in order to be able to offer these experimented and well-informed consumers tailored tourism experiences and products aiming at not only to fulfil their desires and expectations but also to diversify the internal destinations chosen by these travellers.

3.5 EXTERNAL MARKET

Europe has remained one of the most desirable destinations in the world and still holds a market share of over 50% of international tourism. However, early 2017 has brought more uncertainties that risk jeopardizing the prosperity of the tourism industry on our continent.

Regarding the main EU source market, China continues to consolidate as the largest one in recent years and the main spend on the international tourism segment from 2012 to the present, but in a slower rate in the last period. A strong US dollar and very good economic conditions continue to support a strong emitter tourism in the United States but the attitude of the White House administration towards globalization can reverse this trend. Thanks also to a stronger rubble flows of tourists from Russia to European destinations have improved (Russian tourists' departures to European destinations continue to exceed the number of tourists visiting Russia).

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[33] In: https://www.edreamsodigeo.com/wp-content/uploads/sites/19/2017/12/eDreams_ODIGEO_EuropeanTravellerInsightsReport2017_UK.pdf

On the other hand, it is crucial to continue the consolidation of the external image of Europe as Tourism Destination as well as improve the positioning of Europe Tourism Destination brand. This means to have a clear promotional strategy (especially important concerning the external markets) and a reinforcement of the relationship between the EU tourism unit and the European Travel Commission[34] and the European Tourism Association (ETOA)[35] to strengthen Europe's competitive image in long-haul markets.

Another key-element for the external tourism market development is the European visa policy and the full development of the Schengen area once the difficulties encountered for travel to the EU make Europe less competitive than other destinations in the tourist decision-taking process.

This global overview makes necessary that future tourism policies at the European level tackle different international scenarios in what concerns to external source markets (including the effect of the Brexit in tourism flows) at the same time it tries to balance passenger rights, visa policies and strict security preventive measures for terrorist attacks or irregular migration risks.

Aims like branding (please see also section 3.6), destination promotion or initiatives like Destination 2020[36] should be also consider when developing the future EU tourism policy. It is crucial to move forward and look at potential markets outside the EU in a complementary way, integrating the territorial spaces of the Union not covered yet by the tourism promotion.

3.6 BRANDING

As explained in the previous chapter, despite the efforts of the EU institutions, the European tourism industry continues to be no more than the sum of the member States tourism industries which individual strategies are in the great majority of cases are competitive with each other.

One of the reasons that can explain it is the inexistence of a value proposition for 'destination Europe' and the consequent absence of a logical framework for develop its brand and a competent communication strategy to sell destination Europe internally and worldwide.

The website www.visiteurope.com is the prefect image of the inexistence of a coordinated and cohesive brand and related communication strategy once it is also no more than a repository of the individual touristic information of the members States and of the "more touristic" regions in the EU. In there we cannot find references to its emblematic transnational and cross-border tourism packages (most of them developed with the support of COSME programme).

On the other hand, there is no EU tourism label. European tourism quality promotion lies on labels developed in other (whether related) aims like the European Heritage label or Natura 2000 label and their communication value is not exploited by the EU tourism brand. To be more efficient, an EU tourism policy has to explore EU main assets, which makes the difference with other parts of the world, it has to define the above-mentioned value proposition (which cannot forget the relevance that EU's rich and enormous culture and natural heritage have to visitors).

Adding to this, EU's a natural brand that is 'EUROPE', a worldwide recognised brand but not enough recognised as such.A future European tourism policy must uptake the actual value of Europe as a brand turning it in to tourism promotion and make more visible all the European tourism values (in special, its heritage).

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[34] http://www.etc-corporate.org

[35] https://www.etoa.org/

[36] Destination 2020 initiative is a joint initiative of the European Travel Commission and the Tourism Unit (Enterprise Directorate) and other EU's Directorates that aims to promote Europe as a tourist destination involving the entire tourism industry in the definition of a long-term strategy for Destination Europe.

None can imagine promote tourism without thinking about mobility facilities and logistics. The best offer possible is the one that, other than the cultural and natural heritage and accommodation attractivity, can offer a mobility and other basic services in the best conditions possible.

The EU study "The Cost of Non Europe in Transport and Tourism"[37] (2013) looks at the cost of non-Europe in European tourism policy and passenger rights legislation, analysing the existing legislation and policy measures, identifying specific gaps where legislation or further initiatives at European level could be beneficial, and in the tourism area, it quantifies in economic terms the potential for efficiency gains and identifies the main areas, in which EU action would further support the development of tourism and help realise the potential gains identified.

It refers that "significant progress has been achieved during the last 20 years in creating a Single Market for Transports (…) Both sectors suffer however from remaining barriers, gaps and market inefficiencies that create substantial costs and that could be addressed through further action at EU level".

It also states that the creation of a "fully integrated transport sector and a more efficient tourism sector will also mean improved mobility, better environmental sustainability, enhanced internal cohesion and international competitiveness of the EU".

Good direct international and domestic access links are essential to a competitive tourism sector and despite the steady progress, maintaining and improving such links have to be assured as well as face significant emerging issues for tourism policy that are still arising in the area of transportation.

It is necessary to promote a deep reflection about the complementarity of the different types of facilities (not only at national level but also at the European level) and design an interactive map associating them to the tourism destinations targets, namely:

- Ports facilities for cruise liners and marinas;
- Airports facilities;
- Road facilities;
- Rail facilities, including touristic rail;
- Waterways with marina facilities;
- Cycling roads across Europe;
- Equipment for disabled people in every public touristic area, as well as in hotels, restaurants and other tourism equipment.

For example, border regions can share airport facilities avoiding investment duplications and competition and at the same time, increase the potential number of users of the equipment in question.

On the other hand, problems like traffic congestion and air pollution may interfere with the travel decision of many tourists, making of accessibility and mobility a key-influencer of the tourism activity. Thus, transports must be address also from the point of view of sustainability (and as a destinations quality factor): a particular destination can be facilitated by a broad network of alternative forms of transport and innovative urban planning policies.

Another major issue to be addressed should is the legal and/or administrative barriers that limit the extension of several tourism support services like rent-a-cars or travel insurances, for example.

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[37] http://www.europarl.europa.eu/RegData/etudes/STUD/2014/510988/EPRS_STU(2014)510988_REV1_EN.pdf
https://epthinktank.eu/2014/10/30/single-market-in-transport-and-tourism-cost-of-non-europe-report/

Concerning logistics, there are relevant stakeholders for the sustainable development of tourism: travel agencies and tour operators, which role in the organization of the travels and in the promotion of the destinations are still critical (despite the increase of tourists that chose by themselves and use ICT devices to make the travel arrangements). They are now operating in an even more globalised and competitive market that requires much more skills and competences, namely in terms of digitalization of their business.

3.8 TECHNOLOGICAL INNOVATION

Technological and process evolution in communications and information technologies is transforming the traditional models of operation in all businesses, including tourism. These changes represent a major challenge, particularly for small business enterprises in tourism.

In the case of the tourism as an industry, it is redefining also the industry model, redefining the role of central stakeholders like travel agents and tour operators, "creating" new types of agents due to with the support of ITC to the collaborative economy and generating new attractions and products (supported in 3D or holograms animations, for example). A new concept for tourist destinations is also arising - the smart destination[38].

Tourism experiences and memorable moments can now be unique every time tourist repeat it because ITC can provide new realities to experiment in each visit. Adding to that the new profiles of travellers (resulting from the technological innovation):

- Millennials (the largest generation ever and represent the largest passenger market in 2017[39][40]) have grown in the digital age and therefore technology is a part of their travel experience;
- Digital nomads[41] are seasonal travellers and tend to avoid holiday and tourist attractions. They aim to establish their base in cheaper destinations but equipped with a strong digital infrastructure.

Moreover, the "traditional" tourist in general are also evolving thanks to technology they are better informed, uber-connected and multichannel.

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[38] Smart destination: "an innovative space consolidated on the basis of land and cutting edge technology infrastructure; a commitment to the environmental, cultural and socio-economic issues of its habitat, equipped with an intelligence system which can capture information in a procedural fashion, analyses and grasps events in real time, with the aim of facilitating the visitor's interaction with the surroundings, and decision making for the destination managers, increasing its efficiency and substantially improving the quality of tourist experiences." (Ávila and García, 2013).

[39] In Trekksoft Report for 2017 (https://www.trekksoft.com/hubfs/en_trends_2017.pdf?hsLang=en). This reports state as Millenials main characteristics:
   - The option to make travel reservations alone, online, most preferring by using a mobile phone or an application;
   - To know the place of destination in terms of culinary habits, local attractions and authentic experiences;
   - The uptake the opportunity of make of a business trip in a pleasure trip or vice versa;
   - To base the decision taking in referrals of friends and family members, as well as online comments, but not because of ads that promote a particular destination.

[40] Studies of international tourist flows indicate that Millennials will be the most dynamic component of the tourism market in the next decade. It is estimated that by the end of 2020, youth tourism will generate more than 300 million international travellers. (https://www.researchgate.net/publication/286448023_THE_INFLUENCE_OF_NEW_TECHNOLOGIES_ON_TOURISM_CONSUMPTION_BEHAVIOR_OF_THE_MILLENNIALS)

[41] Digital Nomadism is even a deeper trend: 21st Century workers are pursuing flexibility, many opting to work on their own, set up an online business, or work remotely for a company that allows it, giving employees the opportunity to become independent of a fixed location.

The tourism industry needs to evolve, to adapt to new travellers' profiles and to offer products, services and experiences which are ever more exhaustive, flexible and personalised, through the three phases of travel:

- Pre-trip: making available assisted inspiration;
- During the trip: assuring support through smart mobility and services;
- Post-trip: stimulating the 'shared' satisfaction.

This scenario exposes the need for an European tourism policy aware of how disruptive technological innovation is for the relationship between tourism supply and demand acting accordingly (and at the European level) in aims like, by one side, consumer protection or personal data protection, and by the other side, the support to tourism business digitalization or to "digital" tourism products/experiences creation (using innovations like Internet of Things (IoT) and Artificial Intelligence (AI) applications), and, above all, fostering the development (transition) of smart destination all over Europe.

An integrated European tourism policy is needed to support the tourism industry in this competitive challenge, fostering synergies between the research and ICT sectors and the tourism sector as tourism activity cannot be aside of actual tendencies of new technologies.

3.9 SUSTAINABLE TOURISM AND BIOECONOMY

According to the World Tourism Organization[42], sustainable tourism is the one "that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities"[43]. Thus, sustainable tourism should[44]:

- Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.

- Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.

- Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

Tourism, as an economic activity, has to respect these principles and challenges. It has to be sustainable as well in terms of economic returns and jobs duration. Long-term sustainability requires a balance between economic, socio-cultural, and environmental sustainability.

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[42] Please see annex 9.

[43] Making Tourism More Sustainable - A Guide for Policy Makers, UNEP and UNWTO, 2005, p.11-12 http://www.unep.fr/shared/publications/pdf/DTIx0592xPA-TourismPolicyEN.pdf

[44] http://www.greentourism.eu/en/Post/Name/SustainableTourism

On the other hand, maintaining the "supremacy" as the main tourist destination in the world also depends on the EU ability to ensure the touristic flows over time in a sustainable way, namely:

- By improving tourism environmental sustainability (and in line with the earlier detailed in section 3.2) in fields like:

    - tourism services waste production reduction;

    - transports pollution reduction and efficient mobility promotion;

    - rational consumption of natural resources and eco-efficiency promotion;

    - tourist awareness rising to a more responsible behaviour;

    - innovative solutions for the smart mobility of tourists;

    - monitor and management tourist overload areas/periods;

    - adoption of environmental certifications by entire tourist sector and improve their visibility among consumers.

- By improving tourism social and cultural sustainability avoiding/overcoming the conflicts between residents and tourism and safeguard the heritage and identity of local communities.

- By improving economic sustainability finding new ways of increase the added value of the destinations supply value chains as well as the job creation and working conditions improvement.

Present economic and social needs should be fulfilled without undermining the fragile ecosystem that we are sapping and without endangering the ability of future generations to meet their own needs. That is why initiatives like the application of the European Agenda 21 to tourism are fundamental, not only under the sustainability point of view but also to assure a greater cohesion and coordination of tourism policies of the European regions. An Agenda 21 for European tourism would be a single vehicle from which to address all policy recommendations suggested in this report.

Adding to this, there are new trends linked to the change of the consumers behaviour towards environment that should be addressed by the touristic destination Europe: the "slow travel"[45], the "mindful travel"[46] and the holistic health travels (travels to take care of mind, body and soul). These new trends are only compatible with balanced destinations and sustainable models of tourism.

In what concerns to bioeconomy[47] – that is also a new economic trend that are influencing the profiles of tourists – the EU strategy considers that "bioeconomy covers all sectors and systems that rely on biological resources" and tourism is one of them. This concept is also associated with circularity as key-activity for the renewal of the industries and the protection of environment/biodiversity and to climate change by promoting the search for more resource resilient regions (in this specific case destinations).

Therefore, tourism policies (at every level but mainly at the European level) should be design in the framework of bioeconomy (i.e., considering/making of tourism a bioeconomy sector). On the other hand,

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[45] This trend in international tourism is characterized by the preference of tourists for the travels that give them the opportunity to know quietly the holiday destination. Thus, those who approach this type of tourism travel either by train, by car, by boat or by bicycle and by no means by plane.
For them, the travel destination is a location as close as possible to what it means to be traditional and where it can only taste local products and specific foods. In addition, this type of trip enables tourists to establish links with communities they meet and visit places suggested by locals and not just tourist sights indicated by guides.

[46] Mindful travel are travels which main objective is to practice meditation in way that encourages a heightened awareness of the present moment to increase attentiveness, disrupt negative thought processes and find greater peace and happiness (learning to live the present moment without worrying with anything else).

[47] In: Bioeconomy for Europe: Strengthening the connection between economy, society and the environment (the EU Strategy) - https://ec.europa.eu/research/bioeconomy/pdf/ec_bioeconomy_strategy_2018.pdf

tourism can play an important role on boosting bioeconomy. Tourists' purchase power and openness for environmental perspectives can be a good possibility to boost local bioproducts and destinations offering bio-experiences (products and services) can have in it an attraction (differentiation) factor.

It is important that an integrated European tourism policy can also represent an holistic approach, which brings together the best of the region, its people, nature and products.

3.10 CROSS-CUTTING PRINCIPLES: ACCESSIBILITY AND INCLUSIVENESS

As sustainability was already address in section 3.9, there are two more cross-cutting principals that must be present in any discussion about an European tourism policy: accessibility and inclusiveness.

In the particular case of tourism, accessibility represents also a specific type of tourism product that are been developed in all major European tourism destinations not only for conscience reasons but also as differentiating factor because of the economic relevance of the demand for tourist services for people with special needs.

However, in this industry, accessibility and inclusiveness are being addressed as one (accessibility is now being addressed also under the scope of inclusiveness) with the wide objective of making of tourism a mean of combatting discrimination towards people with disabilities and promoting greater social inclusion. If well planned and managed, tourism has the capacity to contribute to minimizing social divisions, thanks to its ability to create employment, even in disadvantaged sectors such as women and young people. For this reason, inclusiveness must be the third transversal principle of a common European tourism policy.

Therefore, a common European tourism policy should support the promotion of a tourism for all not only for the economic relevance of the demand for tourist services for people with special needs, but also for the important ethical issue of guaranteeing the right to tourism for all European citizens and international visitors.

Actions like the initiative Calypso should be upgraded in order to encourage people with disabilities, young, senior and family with low income to go on holiday (in particular, during low season allowing to address other relevant problem faced by tourism destinations, making this industry more competitive at the global level). European stakeholders like ENAT[48] should be support agents in the definition of a "tourism for all" strategy and in the definition of the political principles that should guide de action of the European destination concerning accessibility and inclusiveness in the tourism industry.

3.11 NEW MARKET OPPORTUNITIES

One of the most relevant characteristics of a future European tourism policy is the flexibility to adapt strategy and actions to the quick mutation/evolution of the global tourism industry. This flexibility should mean that policy assures quick answers to quick changes and new emerging trends as well as to uptake emerging market opportunities.

As explained in the sustainable tourism section, maintaining the "supremacy" as the main tourist destination in the world depends on the EU ability to ensure the touristic flows over time in a sustainable

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[48] https://www.accessibletourism.org

way. In this sense, maintaining this supremacy is also to have the capacity to understand the relation offer-demand and to stimulate action for fulfilling the demand expectations and desires regarding tourism activity and tourism destinations.

Some of the new market opportunities to be addressed were already mentioned in the preceding sections:

- To seize the communication value of European cultural and heritage labels for tourism;
- To develop cross-border tourism as a new and differentiating product/experience;
- To diversify internal destinations;
- To uptake the actual value (due to its international recognition) of EUROPE as a brand;
- To promote tourism (industry and business) digitalization and promote digital and technological innovation making of Europe the front-runner destination in this field;
- To answer to the growing environmentally friendly tourists' groups by offering new products like slow travels, mindful travels and holistic health travels;
- To make of Europe a "destination for all".

The time is come to think about use the immense potential, still not yet explored in full (not regrading tourism industry as well as not in terms of growth and jobs).

3.12 GOVERNANCE

"Governance is a practice of government that is measurable, that is aimed to effectively direct the tourism sectors at the different levels of government through forms of coordination, collaboration and/or cooperation that are efficient, transparent and subject to accountability. That help to achieve goals of collective interest shared by networks of actors involved in the sector, with the aim of developing solutions and opportunities through agreements based on the recognition of interdependencies and shared responsibilities"[49].

Governance should be seen to describe what needs to be driven, how and by whom. Therefore, it means: political leadership and ownership (who defines the strategy and how accountability is implemented); coordination (who assures the administrative coordination of actions); implementation (who is assuring day to day operationality, and what financial resources are available – public or private) to assure that an approved strategy and associated action plan is realized.

In the case of an EU tourism policy, even if the sectoral competence remains in the Member States, there is a need for a governance, that organizes the cooperation of different authorities, with a collective wish of reach the targets agreed.

The EU - through its Tourism Unit[50] or a body specifically created with this purpose, should lead the tourism policy conducting and coordinating activities among public, private and social actors in the "tourism system" to create synergies and ensuring a dynamic of permanent growth.

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[49] http://www.aalep.eu/governance-tourism-sector

[50] Directorate General for Internal Market, Industry, Entrepreneurship and SMEs.

As European regions (specially at the cross-border level) share assets can influence on the some destination (destination Europe), the leader of the tourism policy should avoiding duplication or overlap of public policies; giving consistency cohesion and coherence to tourism policies developed are the national/regional levels and encouraging the development of a vision that cuts across the different sectors to expand the scope of the integrated tourism policy itself.

In this aim, there are much work to do on the type of decision support systems the EU should establish to assure an informed policy-making process[51] and related implementation procedures. An integrated European tourism policy should, in a way, represent a road map where institutions and regions (including regional stakeholders) can find the guidelines and specific and practical step towards its full deployment.

That is why to the future tourism policy it must be linked to a specific Structural Funds programme aiming at assuring the financial resources needed to the policy implementation at the regional level without compromising territorial cohesion. That is why the future tourism policy must be the base for a multiannual framework programme for tourism.

Other relevant supporting tools both for the governance and the tourism policy are detailed in chapter 4.

3.13 OTHER RELEVANT AIMS

The transversality of the tourism activity enlarges the aims and scopes that an European integrated tourism policy should tackle and aside of having detailed (in the previous sections) the main aims to be addressed by such policy, there are some remarks that should be consider in its definition:

- Tourism is an industry with an intensive labor market based on people. When tourists visit an attraction destination, they "buy" not only the charm and attractions, but also the services of tourism staff. For this reason, the development of human resources should be a major concern for policy makers.

- Despite the complexity of influencing industry stakeholders through EU policy-making, the behavior of industry stakeholders is a key component of the overall of the European policy. From tour operators to local travel agents, international product suppliers to local service providers, global hotel chains to family guest rooms, international restaurant chains to street corner sandwich sellers, there is a vast range of tourism agents that should be targeted with specific information and programmes.

- Collaborative economy is here to stay. It had opened the tourism industry to a new range of actors, is creating new tourism business and is shaping the traditional tourism business models. These new touristic offers should be fostered but also controlled regarding consumers rights and local community acceptance.

- One final note to highlight that a future European Tourism Policy should take in to account of the different level of development of the tourism activity itself in the different EU regions.

Tourism is not about assets, but about experiences. Transnational tourism will continue to grow. It will be structured according to themes: experiences, emotions, values. It will change the way we plan tourism. This is just the beginning.

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[51] Please note that nowadays, despite the creation of ETIS, countries statistics are not based on the same variables and units and because of that the EU statistics are still not reflecting the overall reality of this sector. European statistic does not measure socio-economic impact of tourism on territories, in general, and in the cross-border areas of the Union, in particular. Thus, it urges to build a information system capable of support an informed policy-making process (and the follow up of the tourism market evolution).

4. TOURISM POLICY SUPPORTING INSTRUMENTS

The complexity of an Integrated European Tourism Policy, as shown by the multiple aims it should address (as detailed in the previous chapter) and the wide range of stakeholders involved in the value chain of the tourism activity as well as the high level of competitiveness and fast change of this industry make of the definition of supporting instruments a central step for its successful implementation.

There are two types of supporting instruments that must be settled along with the tourism policy itself:

- Monitoring and decision-taking supporting tools;
- Financial instruments.

4.1 MONITORING AND DECISION-TAKING SUPPORTING TOOLS

If tourism is a growing industry that has assumed a key-role both in the EU's economy and in the global economy, it is also true that this industry is evolving at a much faster pace than almost every other industry. Within the main reasons for this evolution we can find not only the continuous change of the consumers profiles but also a wide capacity of the tourism destination and tourism agents to adapt to those changes and to diversify their portfolio up-taking all the technological innovation available in the different markets.

Thus, in the tourism industry updated information is a vital element that assures competitiveness and that allows the development of market advantages regarding competitors.

To maintain the first place as world destination requires the development of efficient tools to collect, treat and make available data and information about the offer and the demand in order to establish future trends. This way, strategies and actions will be defined according with the real/on-time industry context and stakeholders will be prepared to face the market changes (even if they arise from innovation and technology developed by/to other industries).

Consequently, there is a need at least to have an EU tourism observatory, appropriate EU official statistics and regular reporting on the policy implementation (including the derivate strategies and actions).

4.1.1 Tourism Observatory

The actual European Commission's **Virtual Tourism Observatory (VTO)** aims to support policy makers and businesses in developing better strategies for a more competitive European tourism sector. It provides access to a broad collection of information, data and analysis on current trends in the tourism sector. It includes the latest available figures on the sector's trends and volumes, economic and environmental impact, and the origin and profile of tourists[52].

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[52] https://ec.europa.eu/growth/tools-databases/vto/

However, even if representing an important step forward, VTO needs to be improved by evolving to a platform:

- Where everybody (EU and worldwide tourism stakeholders) can find the information about the tourism industry in general and European tourism industry in particular (tourism profiles, competitor destinations dossiers, source markets profiles and evolution follow-up, offer characterization, tourism indicators, legislation, inbound and outbound flows characterization, etc.);

- Filled up by the European Commission on the basis of information available from:

  - national, regional and local tourism authorities[53] and from other relevant tourism agents (like for example the UNWTO and its Tourism Satellite Account[54]),

  - Eurostat tourism statistics,

  - periodical reports[55] with the analysis of the situation and trends for the medium and long term (measurement of risks, costs, impacts, limits and opportunities),

  - best practices (database concerning all types of innovation, the use of technology, smart tourism development, tourism destination management, policy instruments efficiency);

- On infrastructures and equipment availability that counts for tourism purposes;

- Organised by thematic;

- Guidance for improvements in a voluntary basis (involving all Member-States and relevant stakeholders in a broader exchange of data and information and in knowledge sharing).

VTO should also be improved concerning the register of the impact on regions NUTs III allowing to understand the impact as well in cross border areas.

4.1.2 Statistics

Also vital for tourism decision taking is the availability of appropriate statistics in due time (reliable statistics should, on the other hand, the main source of data for the above mention observatory).

Feasible statistics allows policy makers to define tangible, measurable and appropriate objectives and priorities for their policy implementation as well as for the strategies and action plans develop with that goal. Feasible statistics allows policy makers to develop policies using an evidence-based approach.

On the other hand, the use of charters, quality marks and certification schemes are recognised as vital tools in ensuring informed stakeholder decision-making.

The existent EU level statistics (Eurostat) are insufficient and needs improvement by enlarging the scope of the collected material. In this case, the UNWTO Tourism Satellite Account is an example to be followed not only in terms of methodology and data collection but also in the terms of how the date is made available for usage of the entire European tourism system.

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[53] In this concrete field, the European tourism observatory can use as benchmark INSTO (International Network of Sustainable Tourism Observatories - http://insto.unwto.org) by aggregating the data and information of national and regional observatories of the member-States.

[54] http://statistics.unwto.org/content/tsadata

[55] Including yearly statistical analysis of the sector evolution by country and region (NUT II and III) with a medium-term perspective, a worldwide perspective and evolution compared to EU.

The current Eurostat data needs to be thoroughly revised and be fully integrated with the statistical functions of Member States to provide accurate LAUs II[56] to NUTs I data from which to develop accurate European meta-data linked to transparent territorial planning processes shared throughout the EU Directorates.

In the particular case of tourism, Eurostat should provide quality data, i.e. data that fit the tourism policy purposes allowing to overcome this industry volatility.

4.2 FINANCIAL INSTRUMENTS

As repeated in the previous chapters, one of the main weakness of the actual EU tourism development is the inexistence of a multiannual financial framework to support it. Tourism activity is a complex one. To be effective there is a need for the intervention of different types of actors and investments.

The future tourism policy must be linked to a specific Structural Funds programme (ERDF) aiming at assuring the financial resources needed to the policy implementation at the regional level without compromising territorial cohesion.

Nowadays and concerning public initiatives, EU policy instruments have been used so far but always under the scope of other economic or social sector (culture, nature, agriculture, maritime and fisheries, and others as explained in the "Guide on EU funding for the tourism sector"[57]). Hence, public initiatives in the field of tourism only are supported if also concerning other sector or industry.

Concerning private investment tourism sector have been assimilated to small and medium sized companies and, as such, they have been supported by EU funding even with a certain refrain since is considered a high return investment (and with no discretionary effect however the relevance of the tourism industry or its transversal impact effects). This support is often given via Directorates-General's specific budgets and European structural and investments funds (Cohesion Policy).

Regarding an eventual specific financial framework for tourism to be included in the set of policy instruments for the 2021-2027 programming period is especially important to:

- Include the private sector as eligible (final) beneficiaries for Structural Funds. In particular, in programmes financing in the cross-border areas, as long as profitable private sector participation is dully justified in terms of provision of maximum sustainability, consistency with the project scope and results durability for the whole project[58].

- Support innovation in tourism[59].

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[56] Local administrative units (LAUs) are used to divide up the territory of the EU for the purpose of providing statistics at a local level. They are low level administrative divisions of a country below that of a province, region or state. Not all countries classify their locally governed areas in the same way and LAUs may refer to a range of different administrative units, including municipalities, communes, parishes or wards (https://ec.europa.eu/eurostat/statistics-explained/index.php/Glossary:Local_administrative_unit_(LAU)).

[57] http://ec.europa.eu/growth/content/guide-eu-funding-tourism-sector-updated-version-0_en

[58] Please see annex 10.

[58] https://cor.europa.eu/Documents/Migrated/Events/EU%20Financing%20Innovation%20For%20Tourism%20-%20Discussion%20Paper.pdf

- Support the implementation of the "New challenges and concepts for promotion of tourism in Europe" (once this European Parliament resolution (2014/2241 INI)[60] reflects several of the aims detailed in chapter 3).

- Support the evolution, innovation and new technologies investment needs.

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[60] http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+TA+P8-TA-2015-0391+0+DOC+XML+V0//EN

5. CONCLUSIONS AND RECOMMENDATIONS

Tourism already represents about 10% of EU GDP, 9% of employment (26 million people directly and indirectly employed) with a perspective to increase in the next decade or so.

Worldwide EU Tourism activity welcomes around 500 million visitors per year corresponding to 40% of worlds' total and representing 31% of total tourism earnings worldwide (around 342 billion €).

Tourism represents 6% of EU overall exports, and 22% of services exports. Tourism is a very important economic and social activity; with a great potential impact on the internal market accomplishment, on EU sustainable economic growth, on jobs creation, and on social and territorial cohesion. Tourism is an important driver for the preservation, protection and promotion of EU cultural and natural assets.

The main results of the last public consultations made by the EU about its tourism policy[61] shows:

- Most tourism stakeholders continue to believe that tourism services are 'best regulated nationally, regionally and locally rather than at European level and any proposed European regulations and standards affecting tourism products and services should be the subject of proper consultation with the stakeholders'.

- Respondents considered that the EU should support the promotion of tourism products, encourage investment in tourist infrastructure and step up efforts to market Europe as a collection of sustainable and high-quality destinations.

- Respondents called on the EU to develop certain common tourism indicators and improve the quality and timeliness of European tourism statistics.

- They also found that the EU could promote knowledge sharing between researchers and tourism industries, as well as initiatives that help to improve the quality standards of tourism services.

Nevertheless, this is possible, only if the EU built up a renewed policy, coordinated between member states and with the other EU policies, in the respect of the national interests and subsidiarity principle.

To maintain the European leadership as first world destination is to act in an integrated way, addressing tourism in all their aims and not as a transversal or supporting sector, assuring the continuity of their economic impact in a sustainable way and deploying all the potential of European assets and values that can not only differentiate Europe from its competitors but mainly by stabilising new and innovative answers to the changes on the demand profile and desires.

In this context, the reflection promoted by the present report, lead to specific recommendations for the aims studied (also fields of concern for action of EP[62], COR, EESC, European Travel Commission[63] (in its European Tourism Manifesto for Growth & Jobs) and other European tourism organisations).

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[61] http://ec.europa.eu/growth/content/give-your-opinion-tourism-policy-0_en

[62] http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+TA+P8-TA-2015-0391+0+DOC+XML+V0//EN

[63] https://www.tourismmanifesto.eu/the-manifesto

5.1 A NEW TOURISM POLICY APPROACH

Europe must have a renewed and deeper approach to Tourism. EU Commission should make a new Communication to European Parliament and Council proposing an Integrated Tourism Policy for the Europe as a whole. This communication shall be composed of an updated 2010 Strategy and an Action Plan for the next 10 years.

The new policy proposal should go along with an allocation of appropriate financial resources, i.e. it must be developed a multiannual financial framework for tourism.

This recommendation is in line with the recent proposals and recommendations of the European Parliament (2015 Resolution on 'New challenges and concepts for the promotion of tourism in Europe') and with Committee of Regions (in a 2016 own-initiative opinion on 'Tourism as a driving force for regional cooperation across the EU').

5.2 SUSTAINABILITY

Sustainability should be understood as a transversal and key development factor for tourism activity and it should be present in all the actions to be developed under the new tourism policy framework.

In this new context, sustainability is not only environment protection scope but also the promotion of an efficient use (in the present and in the future) of European cultural and natural heritage and, as well, the promotion of new supporting activities like bioeconomy.

Therefore, it should be encouraged and finance (via ESIF funds) tourism investments when associated or integrating preservation, promotion and development of cultural and natural heritage.

Regarding the social range of sustainability, it is vital to manage impact of tourism on local culture and communities in destinations and to assure long-term employment with fair working conditions for all.

5.3 COMPETITIVENESS

Improve the competitiveness of Europe destination implies to work to:

- Facilitate the access to the destination (through a smarter visa policy for the Schengen area to minimize the deterrence to legitimate travelers whether for leisure or professional purposes).

- Promote smarter tax policies and better coordination between EU, national, regional and local authorities to ensure Europe remains a competitive destination to visit and in which to do business. VAT, levies, local taxes and air passenger taxes should be included within the scope of the review of the regulatory framework.

- Ensure level playing field and fair competition for all tourism service providers.

- Promote good practices in extending the season and capacity, in diversification and in developing year-round tourism.

5.4 PROMOTION

One of main weaknesses of the current European tourism policy is the promotional strategy that presents Europe as a sum of destinations and not as a destination with own values, resources and attractions.

There is no proposition value or even communication guidelines to present to the source markets, especially at the external level. At the internal level, there are no promotion at all of the "Europe Destination" as only the most relevant sub-destinations have communication strategies for the internal market.

For both markets, it is imperious to have an EU brand or label for "Europe destination" and European tourism. The creation this brand aims at complementing and enhancing the promotional activities of tourism organisations operating at the national, regional, cross-border and local levels, and of the European tourism industry as a whole. It should benefit all European tourism stakeholders (they will be able to increase the value of their own brands and the recognition of their products or services in terms of visibility and competitiveness).

It should be based on an inclusive approach which generates advantages for both established and less-known European destinations while preserving the inherent diversity of different European regions inasmuch as they make a living from their own territorial brand, and that it must fully respect the competences of the Member States in accordance with Article 195 TFEU (as proposed by the EU Parliament)[64].

To present Europe as a global destination it is also necessary to promote long-term joint promotion activities for destination Europe in origin markets, thereby adding value to the efforts of the National and Regional Tourism Organisations and other relevant organisations. In this field, it is especially relevant to promote public private initiatives and support cross-sectoral partnerships.

Making of Europe a relevant travel/visit choice for the largest group of worldwide potential tourists possible can only be achieved by choosing the more efficient communication channels for each potential demand groups, by adapting a communication message relevant for potential each tourist and by presenting (in an appealing manner) all the relevant assets that make Europe an unique destination (a destination accessible and inclusive, a destination with a rich – worldwide recognised – cultural and natural heritage and made of singular sub-destinations like the cross-border ones).

5.5 ACCESSIBILITY AND INCLUSIVENESS

Other relevant task (also relevant in term of competitiveness as it enlarges the target-groups of Europe's potential tourists, can provide deseasonalization as well as support the consolidation of the European citizenship) is the bet on making of Europe an accessible and inclusive destination.

Europe "for all" is a concept based on assuring tourism is a right for everybody no matter their level of income, age or disabilities and it implies to support the development and ongoing promotion of the diversity of tourism offers in Europe (namely by developing products and services specially developed, for example, for people with special needs or young travellers).

Another working field that Europe needs to explore the elimination of language barriers.

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[64] http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+TA+P8-TA-2015-0391+0+DOC+XML+V0//EN, 29.10.2015

5.6 CONNECTIVITY, INNOVATION AND USE OF NEW TECHNOLOGIES

Connectivity, innovation and new technologies are playing an important role supporting the above-mentioned aims and, consequently in changing/adapting tourism to the evolving global context of society and of the demand profiles.

To step up and keep pace in this continuously changing industry is crucial to assure all players access to knowledge and tools that allow them to also (at the individual level) step up.

Thus, it should be considered strategic for the European tourism industry development to:

- Foster and support the digitalisation of the tourism sector through the definition of a "digital4tourism" agenda (using the European 'digital4culture agenda'[65] as benchmark).

- Ensure transparency and neutrality for online consumers and businesses by establishing a regulatory framework that includes consumers rights protection and promoting consumer oriented public-private platform(s)[66].

- Promote smart tourism in all its modalities including the support to the deployment of rural and smart cities for tourism.

- Encourage (and finance) innovation research projects in the tourism sector.

5.7 MOBILITY AND LOGISTICS

Diversify the European tourism offer is also diversifying the places prepared to receive travellers and creating the basic conditions to expand their stays by enlarging the set of places reachable in the same trip as well as assure easy and efficient links with places less known but not less relevant for tourism. Therefore, Europe needs to improve tourism and transport infrastructures in remote, peripheral, rural, mountain, insular and coastal areas and reduce the missing links that have a negative impact on tourism development.

Improve access and diversify visitable places meant also to encourage better accessibility and in-destination facilities near tourist attractions to facilitate access and minimize disruption and to improve quality and coordination of dedicated passenger transport corridors.

Regarding specific transport sectors, there are also important objectives to achieve:

- Complete Single European Sky in order to reduce travel distances, times, costs and CO_2 emissions.

- Harmonization of regulation and guidance in areas like the registration of recreational craft, navigation licenses and safety and tax measures (EESC proposal).

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[65] https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=COM:2018:267:FIN

[66] These platforms should answer to the different tourist need and improve tourism stakeholders' products and services provision by:
- Assuring fair and equal access to relevant data by travel and transport operators to facilitate digital multimodal practices, including end-to-end ticketing.
- Supporting smart tourism solutions and app.

5.8 CROSS-BORDER TOURISM

Linked to the previous section, border regions represent one major example of less known but not less relevant tourism "sub-destinations".

Cross-border tourism in the EU has potential to attract internal and external tourists and support the development of these peripheral regions.

Promotion of cross-border tourism must be based on the common and shared assets of the border as well as the complementarities these territories had developed along the years (and resulting of the consolidation of the EU itself). These strategies must lead to tourism activity development in the affected territories and support (and finance) must be assured to implement it. The support is especially relevant when associated or integrating preservation, promotion and development of cultural and natural heritage in cross-border areas.

5.9 GOVERNANCE

At the governance level, the main recommendation is to develop and to complete the integrated European tourism policy with an EU tourism strategy with clear aims, objectives, indicators and actions, involving the representatives of all the European tourism stakeholders. The strategy will define a roadmap for the implementation of the policy ensuring systematic involvement of tourism's private-sector stakeholders as well as all regions tourism authorities.

It is also necessary to take governance initiatives that allows, by simplification and harmonisation, the European tourism to develop in a very competitive world:

- At the taxation level:

     - Ensure transparency in the collection and subsequent use of tax income arising from the visitor economy.

     - Simplify tax and consumer protection law.

- At the regulation level:

     - Prevent regulatory duplication and remove regulatory contradictions within the single market for tourism services, by ensuring better coordination of policies and regulations affecting tourism among DGs.

     - Create for cultural heritage similar directives like Natura 2000.

- At the guidance level:

     - For sustainable tourism implementation in all European "sub-destinations".

     - In the implementation of EU's quality standards of accommodation and in the harmonization of accommodation classification systems.

     - For smart tourism regional strategies implementation in all European "sub-destinations".

     - For the exchange of good practices and knowledge.

- At the monitoring level:

  - Assure the production of accurate, feasible and homogeneous tourism statistics at the regional level in order to strengthen the decision support systems.

  - Produce statistics report with harmonised statistics at NUTs II and NUTs III level.

  - Harmonise more filtered quality standards to feed current Eurostat statistics.

  - Regularly monitor and evaluate the performance and impact of the visitor on the territorial economy.

- At the knowledge and skills level:

  - Certificate tourism professions at the EU level (EESC proposal).
  - Promote the recognition of relevant qualifications, knowledge, skills and experience throughout the single market.
  - Encourage a more productive relationship between training/education providers and industry (namely by support the improvement of language skills amongst tourism professionals and promote their freedom of movement).

Not less important, at the governance level is to act to raise public awareness about European tourism (as a travel choice and as a relevant economic sector) making of them (as tourists and as receiving communities) a relevant actor for sustainability of this industry.

6. EXECUTIVE SUMMARY

Tourism is a major economic activity with a broadly positive impact on economic growth and employment in Europe. It is also an increasingly important aspect in the life of European citizens, more and more of whom are travelling, either for leisure or business. As an activity which impinges on cultural and natural heritage and on traditions and contemporary cultures in the European Union (EU), tourism provides a textbook example of the need to reconcile economic growth and sustainable development, including an ethical dimension. Tourism is also an important instrument for reinforcing Europe's image in the world, projecting our values and promoting the attractions of the European model, which is the result of centuries of cultural exchanges, linguistic diversity and creativity.

However and despite being one of the most relevant European economic sectors, tourism is not being address as such by the EU government bodies since currently, there is just a shy EU tourism policy under the excuse of "limitations" imposed by the article 195th of the Lisbon Treaty once these bodies "only" have a third level competence in this field (being able to complement, support and coordinate the action of the member States but not to harmonize the Member States tourism laws).

Actually, the European Commission is only acting as a facilitator in a sector where each country has its own Tourism policy with separate rules, incentives and consequent national promotion initiatives worldwide, and proper standards of quality. In fact, EU has no common tourism policy, this is unfortunate, having in mind the growing economic and social importance of this sector.

Now that EU is looking to its future, is preparing a set of new policies to be implemented, is preparing a new financial framework for 2021-27, it is the appropriate time to look at the tourism activity in a different way, creating an integrated EU Policy.

We believe now it is the appropriate time to look at what was done so far and to what is needed to be done in future, organising and promoting a unique tourism destination – EUROPE.

6.1 WHAT IS THE STATE OF ART OF TOURISM POLICY IN EUROPE AND WORLDWIDE?

For the EU, tourism is (and will continue to be) a growing industry in terms of GDP, employment and exports. Europe continues to be the number one tourism destination worldwide being a central pillar of the EU strategy for jobs and inclusive growth.

For 2018, the Word Travel and Tourism Council forecasts[67] for the European Union, in comparison with 2017, an increase of:

- The direct impact of the travel and tourism industry in the GDP of 2.6% (representing 4.2% of the EU's GDP);

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[67] https://www.wttc.org/-/media/files/reports/economic-impact-research/regions-2018/europeanunion2018.pdf

- The total contribution of the travel and tourism industry in the GDP of 2.5% (representing 11.1% of the EU's GDP);

- The direct contribution of the travel and tourism industry to employment of 2% (being responsible for over 14 million jobs);

- The total contribution of the travel and tourism industry to employment of 1.8% (supporting over 31 million jobs);

- The visitor exports up to 3.4% (representing 6,3% of the EU's exports);

- The investment of travel and tourism industry of 4.5% (representing 5,6% of the EU's total capital investment).

These numbers only are enough to justify why tourism industry one of the most important activities for the European Union wealth and welfare.

As a sector that has inter-linkages with virtually all other economic sectors, tourism produces profound and wide-ranging impacts across all dimensions of sustainable development. Thus, on the one hand, tourism offers significant opportunities as a tool for development, including the prospects it offers for rural areas and its potential to incentivize the conservation of environmental resources and cultural assets. On the other hand it has multiple needs requiring targeted support at all levels to remain competitive in the face of increased competition from destinations outside the EU.

Tourism should be treated as a major European industry it already is and that can only be done through a specific European tourism policy.

Tourism should, therefore, be one of the intervention priorities of the EU with a new and innovative logical framework for its development.

Tourism enters in the EU agenda for the first time in mid-1990's became a priority for the EU institutions mainly because of the contribution of tourism to employment gains relevance and, since, them, the mindset behind is approach had slightly change.

In the following table, it is presented a list of the main political and strategic documents EU institutions had produced about tourism.

BODY	REFERENCE	NAME / TITLE
EC	Com(99) 205 Final	Communication: Enhancing Tourism's Potential for Employment
EC	Com(2001) 665 Final	Communication: Working Together for the Future of European Tourism
EC	Com(2003) 716 Final	Communication: Basic orientations for the sustainability of European tourism
EP	P6_TA(2005)0335	Resolution on new prospects and new challenges for sustainable European tourism
EC	Com(2006) 134 Final	Communication: A renewed EU Tourism Policy: Towards a stronger partnership for European Tourism
EC	Com(2007) 621 Final	Communication: Agenda for a Sustainable and Competitive European Tourism
EP	P6_TA(2007)0575	Resolution on a renewed EU Tourism Policy: Towards a stronger partnership for European Tourism
EP	P6_TA(2008)059	Resolution on the regional development aspects of the impact of tourism on coastal regions
EC	Com(2010) 352 Final	Communication: Europe, the world's Nº 1 tourist destination – a new political framework for tourism in Europe
EP	P7_TA(2011)0407	Resolution on Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe
EC	Com(2012) 649 Final	Communication: Implementation and development of the common visa policy to spur growth in the EU
EC	Com(2014) 86 Final	A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism
EP	P8_TA(2015)0391	Resolution on the new challenges and concepts for the promotion of tourism in Europe
EC	Com(2017) 183 final	Initiative for the sustainable development of the blue economy in the western Mediterranean
EC	Com(2018) 251 Final	Adapting the common visa policy to new challenges
EC	Com(2018) 267 final	A New European Agenda for Culture

Almost all of these documents present an approach to tourism as a transversal activity which main aim is to support other activities and industry, and there are several examples of sectoral policies and strategies that affects tourism without taking in to account the impacts the new measures will have in tourism.

The European Parliament seems to be the only institutions with concerns regarding tourism development as an industry by its own as the European Commission lasted publication about tourism is the update of "The Guide on EU Funding for the Tourism Sector, 2014-2020" which present the set of funding for tourism activities/projects in the different thematic programmes of the current multiannual framework.

6.2 WHAT ARE THE MAIN REASONS FOR HAVING AN INTEGRATED TOURISM POLICY?

Regardless the growing relevance of the tourism industry, tourism faces new and more complex challenges due to its cross-cutting multi-level, and fragmented nature, and competing policy priorities and budgetary constraints (OECD, 2018).

This complexity cannot be an excuse for joining efforts to move forward to a truly integrated and coherent tourism policy that reflects the circumstances of individual countries and local communities and supports the pursuit of common and shared goals (OECD, 2018).

In the context of the EU, the majority of the member States have specific tourism policies and long-term, sharing similar visions and goals which ca represent a solid base for the development of a future EU integrated policy that answers to the tourism industry evolution and increasing competitiveness.

The first main reason for having an European level integrated tourism policy is to maintain Europe as first world tourist destination based on a sustainable tourism industry enlarging the effects of this achievement to all the European territory.

The other main reason is the inexistency of a specific framework for the development of tourism as an industry and, consequently, the inexistency of a value proposition for "Europe destination" and of roadmap for sustainable tourism development all-over the EU.

To face tourism industry increasing complexity is to face major challenges in a cohesive and coherent way and:

- Prepare the tourism agents to deal with policy instability (and phenomena like Brexit or terrorism);
- Support stakeholders in developing efficient, quality and innovative products and services to be competitive in the worldwide market);
- Encourage the tourism system to adopt flexible mindsets answer to the emerging niche target groups;
- Promote the digitalization of the tourism business and activities;
- Prepare local and regional administration to be the main agents of the tourism policy in all European territories.

Another major challenge I the set of problems that should be addressed at the European level like the impact of sharing economy on tourism development or the need of balance an open visa policy/Schengen space (more outbound tourism "friendly") and the restrictions to answer/prevent illegal/massive migration phenomena.

Adding to that, a global communication and promotion strategy is missing and despite the efforts and support to increase the transnational and cross-border tourism products, there are no ICT tools or brand to present it to the demand at the European level.

Cross-border tourism, despite being supported through Interreg programmes, is nowadays a missing link between territories and the European policies. Cross-border tourism involves at least two EU neighbouring countries working together in the field of tourism base on shared/common values and assets and EU institutions should be and proactive part in this process not only by facilitating and funding its development but also provide rules and regulation in these relationships (promoting territorial cohesion).

Hence, despite being a vibrant economic sector, it still lacks a cohesive framework of full-fledged EU actions and policies. For the time being, tourism does not constitute a major Commission policy priority and while various EU funds can be used to support tourism-related activities, there is no EU funding axis dedicated to tourism.

Moreover, although Europe remains a competitive tourist destination, it is gradually losing ground to other markets. This trend is expected to grow in the coming years. It remains to be seen whether additional actions will be adopted on behalf of the EU in order for Europe to maintain its prestigious predominance in the field.

6.3 WHAT ARE THE DIFFERENT AIMS TO TAKE INTO ACCOUNT IN AN EU TOURISM POLICY?

Currently and as explained before, tourism as an industry (strict sense) with specificities which needed to be addressed with direct measures and developed through a dedicated strategy that covers all its dimensions and agents.

Unfortunately, at the European Union level, several of the tourism dimensions are addressed through other sectors (like culture, transports or ICT) and under a set of principles and aims designed not to contribute to development of tourism sector but just to support member states in the development of their own tourism activity.

The wider reflexion **For a New EU Integrated Tourism Policy** made during the development of the present document had allow the identification of a set of aims that should be tackled through the lens of tourism:

AIM	JUSTIFICATION/NEEDS
Cultural heritage	- Balance cultural heritage management and tourism activity - Balance the interest of cultural and tourism agents - Valorisation and protection of cultural heritage with especial emphasis on the preservation of immaterial heritage - Conciliation cultural networks- transnational tourism products - Take advantage of the European cultural labels and classified heritage
Natural heritage	- Balance natural heritage management and tourism activity - Balance the interest of nature protection and tourism agents - Valorisation and protection of natural heritage with especial emphasis on the non-classified natural heritage - Support environment friendly tourism - Take advantage of the European natural labels and classified heritage

AIM	JUSTIFICATION/NEEDS
Cross-border Tourism	- Support the integrated management of shared/common assets - Generate new development opportunities for cross-border regions through sustainable tourism - Deploy the potential of border as tourism assets or attractions - Uptake tourism potential to promote territorial cohesion (including at the social level) - Promote cross-border tourism products continuous improvement and innovation
Internal market	- Better promotion of Europe as tourism destination targeting EU citizens - Improve the smart use of data and information produced all-over Europe - Reduce seasonality by improving the low season offer targeting this tourists' group
External market	- Maintain Europe as first world tourism destination - Improve the external image of Europe as tourism destination - Strength the relationship between EUs institutions and key stakeholders working the external market - Include less know sub-destinations (including cross-border territories) in the external tourism promotion actions
Branding	- Define a value proposition for 'destination Europe' - Develop 'destination Europe' brand and a competent communication strategy to sell destination Europe internally and worldwide - Improve the website www.visiteurope.com - Take advantage of the EU labels for natural and cultural heritage in the aim of Europe's communication and destination - Uptake the value of the brand "Europe" for tourism purposes
Mobility and logistics	- Supress legislation gaps (namely the ones that limit the extension of several tourism support services - Promote the integration of the transport the sector and of multimodal transport systems - Coordinate the investment priorities in the transport sector with the specific needs of tourism activity to assure good direct international and domestic links
Mobility and logistics	- Supress legislation gaps (namely the ones that limit the extension of several tourism support services - Promote the integration of the transport the sector and of multimodal transport systems - Coordinate the investment priorities in the transport sector with the specific needs of tourism activity to assure good direct international and domestic links - Promote share airport facilities in the border regions - Support the improvement of competences and skills and the digitalization of tour operators and travel agencies (human resources and business)
Technological innovation	- Support tourism business digitalization - Encourage the creation of innovative and more technological products and services - Develop and support the implementation of the concept of smart tourism and smart destination - Adapt tourism offer to the new profiles of travellers (resulting from the evolution of technical innovation and ICT tools)

AIM	JUSTIFICATION/NEEDS
Sustainable tourism and bioeconomy	- Make optimal use of environmental resources - Respect the host communities - Ensure viable, long-term economic operations - Adapt tourism offer to the new profiles of travellers (resulting from the increase of the number of environmentally friendly consumers/tourist)
Accessibility and inclusiveness	- Adapt tourism offer to the new profiles of travellers (resulting from the increase of the demand for tourist services for people with special needs) - Support the development of tourism as a mean of combatting discrimination towards people with disabilities and promoting greater social inclusion
New market opportunities	- Ensure flexibility to adapt strategy and actions to the quick mutation/evolution of the global tourism industry - Ensure a quick response to the changes in and new profiles of travellers
Governance	- Involve all tourism stakeholder sin the tourism industry development and in the tourism policy implementation - Ensure political leadership, coordination and full implementation of the tourism policy and related strategies and action plans - Work to avoiding duplication or overlap of public policies in the field of tourism (including regarding the different territorial levels) - Assure an informed policy-making process

Source: Own production

Tourism is not about assets, but about experiences. Transnational tourism will continue to grow. It will be structured according to themes: experiences, emotions, values. It will change the way we plan tourism. This is just the beginning.

6.4 TOOLS AND RECOMMENDATION

The complexity of an Integrated European Tourism Policy, as shown by the multiple aims it should address (as detailed in the previous chapter) and the wide range of stakeholders involved in the value chain of the tourism activity as well as the high level of competitiveness and fast change of this industry make of the definition of supporting instruments a central step for its successful implementation.

There are two types of supporting instruments that must be settled along with the tourism policy itself:

- Monitoring and decision-taking supporting tools;
- Financial instruments.

The first category of supporting tools should assure the above-mentioned informed policy-making process despite the competitiveness and fast evolution of the tourism industry and context. As world destination, Europe requires the development of efficient tools to collect, treat and make available data and information about the offer and the demand in order to establish future trends.

 In this context, it seems needed to improve the actual European Commission's Virtual Tourism Observatory (making it available for all the stakeholders, increasing the data and information sources that feed it, providing specific tourism reports and dossiers, etc).

It also seems crucial to improve European tourism statistics (making available more reliable, appropriated and in due time statistics). In particular, Eurostat should enlarge the scope of the collected data and diversify the ways of making it available for usage of the entire European tourism system (namely providing quality data that fit the tourism policy purposes).

Regarding financial instruments, as any other European priority policy, tourism policy requires specific sources of financial support – as multiannual financial framework – available for supporting the intervention of different types of actors and investments.

All these instruments should concur to a renewed and deeper approach to tourism at the European level.

The EU Commission should make a new Communication to European Parliament and Council proposing an Integrated Tourism Policy for the Europe as a whole. This communication shall be composed of an updated 2010 Strategy and an Action Plan for the next 10 years and take in to account the following recommendations.

AIM	JUSTIFICATION/NEEDS
Tourism policy approach	A new Communication to European Parliament and Council proposing an Integrated Tourism Policy for Europe as a whole launching the basis for: - A European tourism development strategy - A 10 years action plan - A multiannual financial framework
Sustainability	- Encourage and finance (via ESIF funds) tourism investments when associated or integrating preservation, promotion and development of cultural and natural heritage - Encourage tourism activities that targets bioeconomy in general - Manage impact of tourism on local culture and communities in destinations - Assure long-term employment with fair working conditions for all
Competitiveness	- Develop a smarter Schengen visa policy - Promote smarter tax policies - Ensure level playing field and fair competition - Promote good practices exchange
Promotion	- Creation of EU brand or label for "Europe destination" and European tourism - Promote long-term joint promotion activities for destination Europe - Define the communication and promotional message(s); channels that highlights the uniqueness of Europe values and assets
Accessibility and inclusiveness	- Improve the accessibility and inclusiveness of Europe tourism destination - Diversify the tourism products and experiences targeting a more diversified audience - Promote the elimination of language barriers
Connectivity, innovation and use of new technologies	- Foster and support the tourism business digitalization (preferably through a "digital4tourism" agenda - Promote smart tourism - Encourage innovation research projects in the tourism sector

AIM	JUSTIFICATION/NEEDS
Mobility and logistics	- Improve tourism and transport infrastructures in remote and peripheral areas and reduce the missing links that impact tourism - Encourage better accessibility and in-destination facilities near tourist attractions - Improve quality and coordination of dedicated passenger transport corridors
Cross-border tourism	- Promote tourism cross-border strategies - Support (and finance) the implementation of cross-border tourism actions
Governance	- Ensure transparency in the collection and use of tax income - Simplify tax and consumer protection law - Prevent regulatory duplication and remove regulatory contradictions within the single market for tourism services - Support regions and regional stakeholders in developing sustainable tourism, in the implementation of common quality standards and for smart tourism strategies implementation. - Assure the production of tourism statistics at the regional level. - Produce statistics report with harmonised statistics at NUT II and NUT III level. - Regularly monitor and evaluate the performance and impact of the visitor on the territorial economy - Certificate tourism professions at the EU level - Recognition of relevant qualifications, knowledge, skills and experience throughout the single market - Encourage a more productive relationship between training/education providers and industry - Raise public awareness about European tourism

Source: Own production

LIST OF ABBREVIATIONS AND ACRONYMS

AI - Artificial Intelligence

ASEAN - Association of Southeast Asian Nations

CO2 - Carbon Dioxide

COR - Committee of the Regions

COSME - Competitiveness of Small and Medium-Sized Enterprises

DG - Directorate-General

EASME - Executive Agency for Small and Medium-sized Enterprises

EC – European Commission

EDEN - European Destination of Excellence

EESC - European Economic and Social Committee

EHL - European Heritage Label

EMA - Eco-management and Audit Scheme

ENAT - European Network for Accessible Tourism

EP - European Parliament

EPICAH - Effectiveness of Policy Instruments for Cross-Border Advancement in Heritage

ERDF - European Regional Development Fund

ESIF - European Structural and Investment Funds

ESPON - European Observation Network for Territorial Development and Cohesion

ETIS - European Tourism Indicators System

ETOA - European Tourism Association

EU – European Union

EUR – Euro

EUROSTAT – European Union Statistics

GDP – Gross Domestic Product

ICT - Information and Communication Technology

INI - Own-initiative procedure

IoT - Internet of Things

LAU - Local Administrative Units

LIFE - European Union's funding instrument for the environment and climate action

NCFF - Natural Capital Financing Facility

NUT - Nomenclature of Territorial Units

OECD - Organization for Economic Cooperation and Development

RFID - Radio Frequency Identification

SME - Small and Medium-sized Enterprises

TFEU - Treaty on the Functioning of the European Union

UNESCO - United Nations Educational, Scientific and Cultural Organization

UNWTO – World Tourism Organization

VAT – Value Added Tax

VFR – Visiting Friends and Relatives

VTO - Virtual Tourism Observatory

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Handbook on Marketing Transnational Tourism Themes and Routes: https://www.e-unwto.org/doi/book/10.18111/9789284419166 [Last consultation: 2019.01.03]

Overview of EU Tourism Policy: https://ec.europa.eu/growth/sectors/tourism/policy-overview_en [Last consultation: 2019.01.03]

Support to tourism businesses: https://ec.europa.eu/growth/sectors/tourism/support-business_en [Last consultation: 2019.01.04]

Sustainable tourism: https://ec.europa.eu/growth/sectors/tourism/offer/sustainable_es [Last consultation: 2019.01.04]

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ANNEX 1

"EU policy aims to maintain Europe's standing as a leading destination while maximising the industry's contribution to growth and employment and promoting cooperation between EU countries, particularly through the exchange of good practice. The EU's competence in the tourism is one of support and coordination to supplement the actions of member countries.

The European Commission is implementing a strategy to increase growth and jobs in the **coastal and maritime tourism sector**.

The beauty, cultural wealth and diversity of the EU's coastal areas have made them a preferred destination for many holidaymakers in Europe and abroad, making coastal and maritime tourism an important tourism sector. Employing over 3.2 million people, this sector generates a total of EUR 183 billion in gross value added and represents over one third of the maritime economy. As much as 51% of bed capacity in hotels across Europe is concentrated in regions with a sea border.

As part of EU's Blue Growth strategy, the coastal and maritime tourism sector has been identified as an area with special potential to foster a smart, sustainable and inclusive Europe.

The EU Commission adopted the Communication, 'A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism' on 20 February 2014, presenting a new blueprint to enhance coastal and maritime tourism in Europe in order to unlock the potential of this promising sector.

The Commission plays a key role as facilitator in this process and monitors progress and reports regularly to other EU institutions. All major stakeholders in the sector (EU countries, regions and industry) are fully involved in the process."

"The competitiveness of the European tourism industry is closely linked to its sustainability and the European Commission works on a number of initiatives in this area.

The Commission Communication, **'Agenda for a sustainable and competitive European tourism'** proposes solutions to the challenges of sustainable tourism."

"The EU recognises the importance of culture as part of the European tourism experience and as an element that can enhance the profile of Europe as a global destination. The European Commission supports the areas of cultural tourism that have the greatest potential for growth.

Europe is a key cultural tourism destination thanks to an incomparable cultural heritage that includes museums, theatres, archaeological sites, historical cities, industrial sites as well as music and gastronomy.

It is estimated that cultural tourism accounts for 40% of all European tourism; 4 out of 10 tourists choose their destination based on its cultural offering.

The EU promotes a balanced approach between the needs to boost growth on one side, and the preservation of artefacts, historical sites, and local traditions on the other (European Cultural Routes).

"Also regarding sustainable the European Commission had created the **"European Tourism Indicators System for Sustainable Destinations Management"** facilitating and encouraging European destinations to "o adopt a more intelligent approach to tourism planning".

"**Accessible tourism** is about making it easy for everyone to enjoy tourism experiences. Making tourism more accessible is not only a social responsibility – there is also a compelling business case for improving accessibility as it can boost the competitiveness of tourism in Europe.

Evidence shows that making basic adjustments to a facility, providing accurate information, and understanding the needs of disabled people can result in increased visitor numbers.

Improving the accessibility of tourism services increases their quality and the enjoyment of all tourists. It also improves the quality of life in local communities.

The European Commission is committed to increasing accessibility in tourism through a number of actions.

Accessible tourism itineraries. The EU is co-funding projects related to the design, implementation, and marketing of accessible tourism itineraries.

The main aims are to:

- Increase the travel opportunities available for people with special access needs
- Promote social inclusion
- Improve the skills of staff in the industry

"Promoting **tourism during the low season** can stimulate economic growth and jobs in Europe. The European Commission has identified seniors and young people as groups that can travel easily during the low season. Reinforcing their contribution to tourism could help to overcome the challenge of seasonality and contribute to the competitiveness of the industry.

The European Commission aims to encourage the cooperation of all stakeholders involved in the senior and youth travel markets to make the most of potential opportunities to extend tourism seasons beyond traditional peak periods."

"The **European Destinations of Excellence (EDEN)** comprises regular competitions to select an emerging 'destination of excellence' based on the commitment to social, cultural, and environmental sustainability. Each competition is based on a specific theme such as rural tourism, aquatic tourism, or accessible tourism."

"**Promoting destination Europe**. To enhance the visibility of Europe as a tourist destination and increase international tourist arrivals, the European Commission undertakes a wide range of communication and promotion activities, as well as making it easier to travel to Europe. Simplifying visa rules. According to a Commission study of 2012, a total of 6.6 million potential tourists from six target markets analysed were 'lost' due to difficulties with visa applications. In order to stimulate the European economy and to facilitate the arrival of tourists to the EU, the Commission proposed important changes to visa rules in April 2014.

Due to the intensity of global tourism competition, the European Commission works with non-EU countries and international organisations to boost international tourist flows to Europe.

The need to promote Europe in emerging economies such as China, Russia, India, and Brazil was spelled out in the 2010 Communication, 'Europe the world's No 1 tourist destination – a new political framework for tourism in Europe'.

These economies, together with countries such as Morocco and members of ASEAN (Association of Southeast Asian Nations), have significant potential to increase tourist flows to Europe. The Commission has strengthened cooperation with all of them to promote sustainable and responsible tourism development models and exchange best practice."

"**Support to tourism businesses**. To maintain Europe's position as a leading tourist destination, the quality of its services needs to be continuously improved. The European Commission is involved in initiatives that improve the skills and mobility of workers, particularly by engaging in global digital networks and helping tourism entrepreneurs manage their businesses.

The Commission manages a range of initiatives that help small businesses in the tourism sector.

Given the huge impact that digital technologies have on the sector, supporting access to and use of ICT tools is a priority area for the Commission.

The Commission is also involved in actions that aim to increase the responsiveness of education and training to labour market needs and help entrepreneurs gain the necessary skills to manage their businesses.

Guide on EU funding for the tourism sector 2014 – 2020

The 'Guide on EU funding for the tourism sector (2014-2020)' gathers information on sources of EU funding of interest to the European tourism industry from both private and public sector."

"Enterprise Europe Network: **tourism and cultural heritage**"

The Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs supports the Tourism and Cultural Heritage Group of the Enterprise Europe Network.

The Enterprise Europe Network is a key initiative of the European Commission that helps small companies make the most of business opportunities in the EU.

The Tourism and Cultural Heritage Sector Group is one of 17 expert sector groups at the Enterprise Europe Network who organise brokerage events to help businesses reach technology transfer or cooperation agreements with other companies in their sector.

The Tourism and Cultural Heritage Sector Group also provides other services such as:

- finding business partners for tourism products and services throughout Europe;
- promoting new technologies for tourism and cultural heritage at national and European level;
- arranging bilateral meetings with potential partners at tourism and cultural heritage fairs and company missions (notably in the context of the Mission for Growth initiative)
- advising companies on funding opportunities and helping them apply for EU grants;
- promoting and implementing multidisciplinary research projects in tourism and cultural heritage;
- providing information about international conferences and workshops;

- providing guidelines on starting a business in tourism;

- communicating small business interests and concerns to EU policy makers."

In the aim of cultural heritage, and its intimacy relationship with the tourism activity, there is a relevant EU institution - the European Institute of Cultural Routes – in charge of the certification and promotion of **European Cultural Routes** like the Way of Saint James.

Currently there are 33 Cultural Routes of the Council of Europe illustrating "European memory, history and heritage and contribute to an interpretation of the diversity of present-day Europe". All of them represent relevant tourism products for the territories they pass by.

ANNEX 2

BODY	REFERENCE	NAME / TITLE
EC	Com(99) 205 Final	Communication: Enhancing Tourism's Potential for Employment
EC	Com(2001) 665 Final	Communication: Working Together for the Future of European Tourism
EC	Com(2003) 716 Final	Communication: Basic orientations for the sustainability of European tourism
EP	P6_TA(2005)0335	Resolution on new prospects and new challenges for sustainable European tourism
EC	Com(2006) 134 Final	Communication: A renewed EU Tourism Policy: Towards a stronger partnership for European Tourism
EC	Com(2007) 621 Final	Communication: Agenda for a Sustainable and Competitive European Tourism
EP	P6_TA(2007)0575	Resolution on a renewed EU Tourism Policy: Towards a stronger partnership for European Tourism
EP	P6_TA(2008)059	Resolution on the regional development aspects of the impact of tourism on coastal regions
EC	Com(2010) 352 Final	Communication: Europe, the world's Nº 1 tourist destination – a new political framework for tourism in Europe
EP	P7_TA(2011)0407	Resolution on Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe
EC	Com(2012) 649 Final	Communication: Implementation and development of the common visa policy to spur growth in the EU
EC	Com(2014) 86 Final	A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism
EP	P8_TA(2015)0391	Resolution on the new challenges and concepts for the promotion of tourism in Europe

BODY	REFERENCE	NAME / TITLE
EC	Com(2017) 183 final	Initiative for the sustainable development of the blue economy in the western Mediterranean
EC	Com(2018) 251 Final	Adapting the common visa policy to new challenges
EC	Com(2018) 267 final	A New European Agenda for Culture

Source: Adapted from "Inventory of Policies related to Sustainable Tourism", Interreg Danube Transnational Programme – Insights project.

ANNEX 3
EU Countries and the Tourism Sector

MEMBER STATE	TOURISM SHARE %		
	On GDP	On EMPLOYMENT	On SERVICES EXPORT
Spain	11	13	48
Portugal	9	9	48
France	7	7	18
Malta	7	14	
Italy	6		40
Greece	6	10	53
Germany	4	7	13
Austria	6	8	32
Ireland	3	10	4

ANNEX 4
UNWTO Definition of Tourism

In order to prevent the disaccords to define "Tourism", UNWTO defined it as indicated below.

"Tourism comprises the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes."

Tourism is different from travel. In order for tourism to happen, there must be a displacement: an individual has to travel, using any type of means of transportation (he might even travel on foot: nowadays, it is often the case for poorer societies, and happens even in more developed ones, and concerns pilgrims, hikers …). But all travel is not tourism.

Three criteria are used simultaneously in order to characterize a trip as belonging to tourism. The displacement must be such that.

It involves a displacement outside the usual environment: this term is of utmost importance and will be discussed later on.

Type of purpose: the travel must occur for any purpose different from being remunerated from within the place visited: the previous limits, where tourism was restricted to recreation and visiting family and friends are now expanded to include a vast array of purposes.

Duration: only a maximal duration is mentioned, not a minimal. Tourism displacement can be with or without an overnight stay. We shall discuss the particularity of in transit visits, from a conceptual and statistical point of view.

ANNEX 5
European Heritage Label (EHL)

A European Heritage Label (https://ec.europa.eu/programmes/creative-europe/actions/heritage-label_en) exists but is very shy and is given on a voluntary basis. Is clearly not enough and should cover the entire EU relevant heritage.

The European Heritage Label is given to heritage sites that celebrate and symbolise European history, ideals, and integration. These sites are carefully selected for the role they have played in European history and the activities they offer to highlight it. The Label gives to European citizens, especially young people, new opportunities to learn about our common yet diverse cultural heritage, and about our common history. It contributes to bring European citizens closer to the European Union. The European Heritage Label can also help to increase cultural tourism, bringing significant economic benefits.

The scheme was established by Decision 1194/2011/EU of the European Parliament and of the Council. The Label is open to the participation of the Member States on a voluntary basis.

Since 2013, 38 sites have been designated under the label.

This Label only considers potential material culture heritage, is very limited the registered number of cases and does not considers Natural heritage.

ANNEX 6
Culture Data

Europe is a key cultural tourism destination thanks to an incomparable cultural heritage that includes museums and memorial houses, theatres, archaeological sites, historical cities and monuments, industrial sites, religious buildings as well as music (including traditional folk manifestations), ethnography, gastronomy important cultural and science institution and local personalities.

It is estimated that cultural tourism accounts for 40% of all European tourism; 4 out of 10 tourists choose their destination based on its cultural offering.

The EU recognises the importance of culture as part of the European tourism experience and as an element that can enhance the profile of Europe as a global destination. The European Commission supports the areas of cultural tourism that have the greatest potential for growth.

Regarding the expenditure on public services, cultural spending by governments yet accounts for only 1% of government outgoings in the EU28 (62 billion euros for 2012) – a share unchanged during the decade to 2012 and far behind education (10.7%).

Culture-based development can have a stimulating effect on creativity and entrepreneurship both in 'convergence' regions – areas with a GDP/capita of less than 75% of the average GDP/capita of the EU – and more competitive regions.

There is a study on going under ESPON: **"HERITAGE - The Material Cultural Heritage as a Strategic Territorial Development Resource: Mapping Impacts through a Set of Common European Socio-economic Indicators"** (inception report)[68].

Another document of interest is the **"Mapping of Cultural Heritage actions in European Union policies, programmes and activities"**[69].

ANNEX 7
Natural Heritage Data

According to UNESCO classification **Natural heritage is defined as** natural sites with cultural aspects such as cultural landscapes, physical, biological or geological formations.

To this, we can add the enormous and unique effort to control air quality.

EU Natural heritage is unique. Coastal and maritime landscapes, Mountains, Lakes, Islands, Parks, Forests, Rivers, Dams, Waterways, etc. This entire heritage should be given the appropriate relevance and promotion, with an economic and social interest for EU citizens.

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[68] https://www.espon.eu/cultural-heritage

[69] http://ec.europa.eu/assets/eac/culture/library/reports/2014-heritage-mapping_en.pdf

ANNEX 8
Technological Innovation: Examples of Actual Tendencies

A. Digitalisation of patrimony to make this information available for potential visitors and tour operators

Commission Recommendation on the digitisation and online accessibility of cultural material and digital preservation.

The Commission Recommendation 2011/711/EU on the digitisation and online accessibility of cultural material and digital preservation, adopted on 27th October 2011 calls for concerted action by Member States to digitise and preserve their cultural heritage, to make it available online for leisure, studies or work and for re-use in creative efforts (e.g. in tourism or for education).

The calls on Member States inter alia to encourage their cultural institutions to make their digitised material available through Europeana, to create the legal framework conditions underpinning licensing mechanisms for the large-scale digitisation and cross-border accessibility of works that are out-of-commerce and to promote the availability of databases with rights information, connected at the European level, such as ARROW.

While the Orphan Works Directive2 and the Memorandum of Understanding on Out-ofcommerce Works3 aim at facilitating the digitisation and accessibility of copyrighted material, the Recommendation on digitisation encourages public-private partnerships, as well as the use of structural funds, to support digitisation. It also calls for the reinforcement of national strategies for the long-term preservation of digital material.

In 2016, the Commission published a report assessing the overall progress in the implementation of the recommendation. According to this evaluation, an increasing number of countries are supporting open cultural heritage data and promoting its reuse.

Nevertheless, there are still great differences across Member States, and cultural heritage digitisation remains widely dependent on cultural institutions' initiatives and funding.

B. Smart Tourism to boost tourism and "tourism e-commerce"

Some examples:

- **Wi-Fi connectivity:** When travelling, people want to always be connected, either to get destination ideas, options regarding places to visit or eat, find directions to points of interest, or share their experience with friends via social media or other connectivity platforms. As a result, investing in network services helps companies offer a more seamless and highly personalized experience to customers, boosts operational efficiency, real-time decision making, strengthens the physical (via CCTV) and the cybersecurity, along with data privacy.

- **Wearable devices:** Despite a sluggish start, travel and tourism companies are gradually using this technology to offer customers a more personalized and united experience. For instance, the Walt Disney Company deployed a wearable, customizable, RFID-equipped MagicBand, which connects to the theme park infrastructure, to reduce waiting times and track guests' locations and activities.

- **Internet of Things (IoT):** IoT has a lot of potential to shape the future of the travel and tourism industry, and companies have started to realize that. An example of an industry player using IoT to reduce anxiety and stress levels associated with lost bags is Lufthansa. Passengers can track their baggage via a link found on their mobile boarding pass in the Lufthansa app.

- **Tour Systems.** New technology allows individuals on group or self-guided tours to get the information they need as they view historical landmarks, architecture and artefacts. Example - **Self-guided tours**: Travelers can download an app to their smartphones, which provides expert commentary as they move through a museum exhibit, attraction or neighbourhood.

- **Smart tourism.** Nowadays, new products and services are being developed in consideration of technological developments and innovations in the smart tourism gateways[70].

ANNEX 9
World Tourism Organization Sustainable Tourism "Manifesto"

The twelve main goals for sustainable tourism laid out in 2005 by the World Tourism Organization and the United Nations Environment Program are as follows:

1. Economic Viability: To ensure the viability and competitiveness of tourism destinations and enterprises, so that they are able to continue to prosper and deliver benefits in the long term.

2. Local Prosperity: To maximize the contribution of tourism to the economic prosperity of the host destination, including the proportion of visitor spending that is retained locally.

3. Employment Quality: To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.

4. Social Equity: To seek a widespread and fair distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services available to the poor.

5. Visitor Fulfilment: To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability or in other ways.

6. Local Control: To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders.

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[70] https://www.researchgate.net/publication/321906089_The_Relationship_between_Innovation_and_Tourism_The_Case_of_Smart_Tourism

7. Community Wellbeing: To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.

8. Cultural Richness: To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities.

9. Physical Integrity: To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment.

10. Biological Diversity: To support the conservation of natural areas, habitats and wildlife, and minimize damage to them.

11. Resource Efficiency: To minimize the use of scarce and non-renewable resources in the development and operation of tourism facilities and services.

12. Environmental Purity: To minimize the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

ANNEX 10
Proposal for the modification of the COM's proposal of Regulations ERDF and Cohesion Fund

One of the most important economic activities in the cross-border areas is the Tourism. The Tourism activity is related in these areas very often to the Natural and Cultural heritage. In the typology (128-131) of the Common Regulation 'ANNEX I Dimensions and codes for the types of intervention for the ERDF, the ESF+ and the Cohesion Fund - Article 17(5)'is not clear whether a private investment in tourism accommodation including promotion and development of Cultural and Natural Heritage is eligible for ERDF. It is why we make a proposal for modification in the Article 2 of ERDF and CF Regulation.

Proposal for the modification of the COM's proposal of Regulations ERDF and Cohesion Fund

REG. COM (2018) 372 final of 29.5.2018 (ERDF + COHESION FUND)

Article 2
Specific objectives for the ERDF and the Cohesion Fund

(e) "A Europe closer to citizens by fostering the sustainable and integrated development of urban, rural and coastal areas and local initiatives" ('PO 5') by:

(ii) Fostering the integrated social, economic and environmental local development, cultural heritage and security, including for rural and coastal areas also through community-led local development **as well as in cross border tourism investments when associated or integrating preservation, promotion and development of cultural and natural heritage**.

EPICAH (Effectiveness of Policy Instruments for Cross-Border Advancement in Heritage), an interregional cooperation project for improving natural and cultural heritage policies.

Project Partners:
- Atlantic Axis of Peninsular Northwest (PT)
- Regional Development Agency of the Pilsen Region (CZ)
- Peipsi Center for Transboundary Cooperation (EE)
- Regional Development Fund on behalf of the Region of Western Macedonia (EL)
- Atlantic Axis of Peninsular Northwest (ES)
- Iberian Association of Riverside Municipalities of Duero River (ES)
- Tokaj Wine Region Nonprofit LLC (HU)
- Agency for the Development of the Empolese Valdelsa (IT)
- Satu Mare County Intercommunity Development Association (RO)

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