

## Meeting of Directors-General for Tourism (8th of March)

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## 1. Meeting of Directors-General for Tourism (Summary report)

Main Goals For The Tourism Ecosystem: Skills, Digital Transition, And Sustainability.

### Short term

- Is crucial to ensure that the installed capacity remains active and capable to quickly respond to the new demands presented by the market.
- Promote Tourism as the key element to regenerate our countries.
- Increase the competitiveness of the EU as a touristic destination.
- Urgency in coordination and cooperation to re-open. No time to waste.
- It's essential to regain trust in travel and tourism.
- EU needs to put in place a system to allow tourism and travel and move forward in international mobility and promote the recovery of the sector.
- Cooperation and coordination on common and recognized protocols and documents: vaccination certificates, fast antigen testing, test result certificates and other instruments at EU level.
- Development or adoption of a technological system or platform to support that data, an interoperable and digital tool that will gather health information from passengers. These digital tools can even be based on already existing work done by many Member States with their digital platforms or travel passes.
- Delivering well-targeted financial supports to vulnerable tourism businesses and workers continues being crucial, therefore The EU should allocate adequate economic and financial tools for the recovery and to foster crisis repair but also for medium / long term reforms preparing a green, digital and resilient recovery of the economy.

### Medium / Long Term

- Re-opening and the Recovery has to bear in mind the impacts of tourism on the environment and on local communities
- try to provide a more diversified offer and a sustainable contribution to economic growth.
- Define regional strategies and local approaches, within the national and European policies.
- One of the main challenges for developing new innovative solutions is often financing. Private and public sectors must work together on this. MS are expecting the COM's presentation on the financial MFF instruments.
- Special attention to simplifying procedures and allow MS to develop Transnational programmes.

Therefore, sustainable tourism is key:

- Digital transition and an element of innovation but also of sustainability and greener business,
- Sustainability as new opportunities contributing to more inclusive job growth and reduce inequalities,
- Rapidly moving towards environmentally safe, zero carbon footprint,
- Spread over several regions and not concentrated on a few destinations,
- Tailormade for different demands provided by expertise supply,
- Improvement of skill (reskilling and upskilling),

Several Member-States expressed their wish for regular meetings on tourism to debate and share views, in order to better built robust policies for the development of the sector.

## 2. Meeting of Directors-General for Tourism (Main report)

The meeting opened with an intervention from the **Portuguese Secretary of State for Tourism, Rita Marques**, announcing the main objectives of the meeting

In her opening speech stated that Europe's business is essentially composed of SMEs and tourism is no exception, which is why we must pay special attention and make efforts to ensure the survival of our SMEs, providing means for them to adapt, evolve and to be more competitive, through technology, support their digital transition, promote the green transition, help them thrive.

It is also essential to restore consumer confidence and ensure that we are able to respond to their demands and expectations but also guarantee a space for future generations to aspire their well-being.

The coming months of international tourist activity will require innovative, resilient and adaptive approaches.

Europe has made efforts to act in a more coordinated manner and using harmonised criteria on restrictions enforcement, but we must go further, and reinforce cooperation in this matter at global level, to allow international travel to resume safely.

As set in the objectives of the Portuguese Presidency of the EU Council and already publicly disclosed we have 3 main goals for the tourism ecosystem: **Skills, Digital transition, and Sustainability**.

Tourism must respond to the wishes and needs of customers and appeal to new forms of tourism, for example to diversify destinations and experiences.

That is why it is important to support innovation as a key for tourism ecosystem's resilience and share best practices as we will be able to learn.

In the scope of sustainability, the tourism development model must be structured and based on sustainability principles in all segments of the tourism sector, moving towards a carbon-free reality, minimizing environmental impacts, but equally social impacts in the hosting communities.

### a) **Innovation projects presented**

This meeting's main theme was Digital and Innovation, and to debate it the Portuguese Presidency invited to share their views and best practices, projects related to the area of tourism in order to enrich the debate and show perspectives for possible answers to the challenges ahead.

#### **Itai Green -Founder and CEO of Innovate Israel**

Itai Green brought an approach to the innovation ecosystem existing in Israel, namely notes on company organization with a view to maximizing the potential of employees, the valorization of skills improvement, the interconnection between companies from different sectors of activity, that can be partners in the creation of an added value chain (Presentation available with this Communication).

### **Roberto Antunes – NEST Portugal**

Roberto Antunes made a presentation regarding the importance of NEST - Centre for Tourism Innovation, as an anchor to contribute to empower Portugal as a global hub of innovation in tourism (Presentation available with this Communication).

### **Patrick Ohnewein - NOI TechPark - Italy**

Presentation of the tool developed by NOI Techpark Südtirol/Alto Adige "Big data for tourism scoreboard", supported by European Union funding, namely from the European Regional Development Fund.

This tool allows to gathering and sharing data for common use by tourism companies and to launch some perspective regarding a possible European wide scoreboard (Presentation available with this Communication).

## **b) Directors General debate**

### **Presidency: Luís Araújo, President of Turismo de Portugal**

Welcoming member states' representatives highlighting the importance of working together and sharing information.

Tourism faces one of the most difficult moments of its existence. Tourism represented a highly competitive and prosperous reality and now faces a deep crisis that we must overcome together.

That is why I strongly believe that we must act now in a coordinated way:

1. to save the millions of livelihoods depending on the sector
2. to capitalise on this opportunity to reinvent tourism in Europe.

The forthcoming months will require a management capability that is both agile and adaptive, planning for short, medium- and long-term targets.

✓ we need to establish harmonised travel measures and restore Schengen integrity.

### **We already had answers:**

The European Commission announced that it will present a legislative proposal during March for a "Digital Green Pass" that will concentrate info like proof of vaccination; results on tests and info on Covid19 recovery. WE HAVE NO TIME TO LOOSE - each day that passes is a day we loose.

Platforms from Member States or other solutions that have been developed should be considered as a basis for quick implementation.

✓ tourism must be firmly anchored in the recovery and resilience plans of all EU Member States.

We need to urgently help tourism enterprises, family run businesses, to easily access the necessary funding to allow their survival and help rebuild their activity in a digital and environmentally friendly way.

TOURISM needs support, now more than ever, for its strategic transformation.

- **Digital:** Promoting "seamless travel" using new technologies; providing consumers with solutions that guarantee a simplification in mobility, customized information, automation of reservations and payments, etc.

- **Environmental:** It is imperative to start today a carbon-free transition to a more sustainable business model, through the implementation of intelligent energy, water and waste management systems; positioning tourism companies as leaders in terms of adopting good practices
- **Qualifications and Training:** A significant investment is needed in the training of the sector's workforce, both at top, middle and operational management, in order to allow companies to make an effective transition to the digital and green economy and provide a long-term career perspective to the talents.
- ✓ even though triggered by such a dramatic crisis, we have a real opportunity now to reinvent the tourism sector of tomorrow

We have ambitious goals in Europe:

- Reach a sustainable growth,
- fight climate change,
- promote digitalisation and innovation.

The EU must exchange good practices and reinforce its cooperation and coordination in the framework of a common approach to the Tourism sector 2030/2050 with shared priorities and an action plan, to drive the green and digital transition of the tourism ecosystem and strengthen its competitiveness, resilience and sustainability.

Financial Support is crucial to save the sector from collapse, but also to promote a far-reaching modernization of the tourism sector, to ensure Europe's leading position in tourism.

It is crucial that Tourism is recognized by European institutions as a pillar to sustainable growth, cultural understanding and social wellbeing in Europe.

The measures already in place to mitigate economic shocks and save businesses are important BUT we expect also to have significant support to tourism within the National Recovery and Resilience Plans as well as in the Multi-Annual Financial Framework 2021-2027.

We are working, during the Portuguese Presidency of the Council of the EU, to give Tourism the priority that is justified.

Although we obviously need some focusing on the short term, I hope that we can see beyond and start setting the foundations for the work to come

GUIDANCE QUESTIONS for debate:

- What is your assessment of the measures taken at EU level at the innovation and digital and what further measures should be taken in order to ensure it a better support for the tourism sector?
- What would be the best way forward to ensure a common approach for the EU to exchange good practices and reinforce its cooperation and coordination in the framework of a common approach to the Tourism sector 2030/2050 underpinned by shared priorities and an action plan?

**European Commission: Valentina Superti, DG Grow**

Member States have multiple support Instruments that must use: Horizon, Digital Europe, MFF, Next Generation EU, SME's support funds.

The COM is working on a funding guide for the tourism ecosystem in the next month, hoping to increase transparency and raise awareness on the existing funding.

MS in their Recovery and Resilience Plans need to reflect substantive reforms and investment efforts. The COM will assess the Recovery and Resilience Plans developed by the Member States on the basis of the established criteria.

Member States should ensure the effective and efficient functioning of these synergies, through a coherent and harmonized approach by all authorities involved.

The overall objective will be to promote the Union's economic, social and territorial cohesion, improving resilience, crisis preparedness, adjustment capacity and the growth potential of Member States.

These plans must contemplate a share on the funding of 37% for Green transition and 20€ on Digital transformation; They must also promote Sustainable and inclusive growth, including economic cohesion, employment, productivity, competitiveness, research, development and innovation, and a well-functioning single market with strong SMEs; Social and territorial cohesion.

The Recovery and Resilience Plans must be composed by reforms and investments taking into account cross-border, transnational and cross-sector objectives.

**Spain: Miguel Sanz Castedo, Director General de Turismo**

Europe must improve seamless travel, but there are too many legal framework restrictions in place.

Digital transition is key therefore a form of certificate being a passport, a tool or other is crucial to re-establish travel and trust.

Europe cannot have another summer like 2020. We need to put in place a system to allow tourism and travel and move forward in international mobility and promote the recovery of the sector. It's essential to regain trust in the activity of travel.

EU is number 1 destination. Not only south countries, Tourism is also important and has a high weight in GDP in Austria and other northern countries, so it's a European concern.

ETC is well placed to develop and provide data and models for certificates and contribute to the promotion and marketing of EU as a destination, in third markets.

**Greece: Panagiota Dionysopolou, Director General for Tourism**

Greece said that these meetings should take a regular format to keep discussion alive and sharing ideas and improve cooperation.

Greece thanks the COM for the development of a Green Pass Certificate to provide information that will allow re-establishing travel, tourism and promote confidence.

Regarding the innovation and digital approach, EL expressed that is trough collective intelligence that we may develop methodologies to recover.

At the same time, EL stated that a coordinated approach based in sustainability is essential to reduce the environmental footprint.

Digitalization creates a new reality and opportunity for tourism. The contribution of data intelligence will contribute for new policies and promote sustainable tourism development. The green and digital transition will need reskilling, contributing to more inclusive job growth and reduce inequalities.

One of the issues and challenges for developing new innovative solutions is often the financing, especially during difficult times (like the post-covid times). Private and public sectors must work together on this. We're hoping that the new EU instruments put in place, especially Horizon and Transnational cooperation programmes are simplified and make the procedure easier for interested parties.

**Estonia: Kristi Talving, Deputy Secretary General of the Ministry of Economic Affairs and Communications:**

In order to restart tourism sector while taking care of the pandemic and health concerns, we must concentrate on vaccination and implement certifications as proof of vaccination.

EE Supports the development of a digital certification tool. The EU needs coordination between Member States regarding the travel restrictions.

Data will play a base role on the future recovery plans and actions.

Regarding future planning 2030/2050 our efforts should be on building resilience and readiness for any future crisis.

EE puts a lot of efforts on promoting responsible tourism and sustainable policies to achieve the objectives of green and digital transition.

**Austria: Ulrike RAUCH-KESCHMANN, Director General, Tourism and Regional Policy, Federal Ministry for Sustainability and Tourism**

Austria thanks the very interesting presentations at the opening of this meeting. The sector is full of uncertainties, innovation and digital transition is crucial and fundamental.

Welcomes the travel package announced by the COM of a Green Pass with relevant information (vaccine, immune by infection or negative testing). This can only be achieved via cooperation and interoperability between different systems already developed or in place.

Advises against putting too much burden on enterprises on gathering Data. We must agree on holistic data systems by public and private sector and shared with SME's.

Tourism stakeholders should be involved from an earlier stage to provide a voice for their concerns and needs.

Highlighted the importance of improving seamless travel which was one of the key themes addressed at the European Tourism Convention in October 2020. AT supports regional strategies and local approaches. Wishes for regular meetings on tourism

**Belgium: Patrick Bontick, CEO of Visit.Brussels**

Innovative and digital strategies are key to promote resilience and recovery for the sector.

Covid 19 affected deeply this sector. Highlights MICE tourism, which is a sector of crucial importance to BE.

Cross border experience should be shared between MS and built common initiatives.

Digital transition needs a digital strategy (already in progress) and data is one of the basic tools needed for designing a robust policy.

BE gave some best practices examples regarding tourism digital activities, like virtual tours on most Brussels' museums.

BE Is looking for the negotiation and approval of the proposed Council Conclusions.

**Finland: Ilona Lundström, Director General at Ministry of Employment and the Economy**

Green transition and sustainability have been a priority for FI and digital transition has been pushed faster by the covid pandemic.

FI is glad to highlight that digital remains a debate, stating their Presidency of the Council of the European Union In 2019 had put a lot of effort into this area.

Highlight the need for information, regarding financial tools and instruments of the UE, to provide SME with better access to information.

Data driven tourism economy is essential for enterprises to be successful in the future.

Digital data management is important for decision and also for monitoring several indicators, like carbon footprint or sustainability status.

**Hungary: Adam Czalleng, Director for research at Hungarian Tourism Agency**

Hungary agrees with the need for available EU data, common indicators and trustworthy systems. Detailed the Hungarian statistical approach where national data plan has a subsector scheme for tourism.

Sustainable Tourism is crucial at local level.

Members States need to work on big data on several levels, including the local level to have concrete answers to the problems, especially because the trends visible in one country have an impact on another.

**Malta: Mark Camilleri, Director, Policy Development and Programme Implementation**

Health specialist warned the Covid-19 will be here in the years to come, so we need a multiple combination of solutions to bring back confidence and security on travel decisions.

Digital transition is central for recovery efforts. Digital Services Act must protect consumers and ensure safe management of data.

Support measures must promote competitiveness, development and sustainability. The measures and policy decisions promoting digitalization and green transition are already in the right way and will produce results in future.

**Croatia: Natalija Haviđić, Head of Sector for Strategic Planning and Implementation of EU Programs and Projects, Ministry of Tourism of Croatia**

Croatia supports the Portuguese Presidency priorities for tourism.

Tourism should be included in mainstream policies since it relates to several other policies such as transport, health, culture and environment.

Tourism of tomorrow needs innovation and digitalization but also new and better skills. Encouraging cooperation and sharing good practices. Investment in new destinations and new management models must be supported by Investment In skills.

Highlights HR support for an Agenda 2030/2050.

Clear short-term plans and precise long-term directions need support by EU lines and policies.

HR wish for Innovative, green, digital, inclusive and safe tourism.

**CYPRUS: Theofanis TRYFONOS, Director General of the Cyprus Deputy Ministry of Tourism**

Money is not the only thing we need for digital and sustainable transition. We need adjustment on other measures like the regulatory framework, (for example - flexibilization on state aid).

**Presidency: Luís Araújo, Presidente do Turismo de Portugal I.P.**

Wrap-up of the meeting: Tourism in a short/medium / long term must focus on green transition, digital transformation, and human resources qualification.

This work must involve other Tourism organizations such as ETC, in order to pursue the sustainability goals. We need to work together and, for example, organize a benchmark or a forum where we can develop our Ideas. Some member states Identified specific segment such as MICE segment.

We all felt the urgency to re-emerge Europe as a tourism destination.

## Annex 1

### Report from Big Data Enabling Tourism Competitiveness Seminar 8<sup>th</sup> March 2021

During the morning session on the 8th March, back-to-back with the Director's General for Tourism meeting, the Portuguese Presidency of the EU Council, represented by Turismo de Portugal, organized an international event to discuss the role of big data in fostering tourism competitiveness, highlighting the importance of big data for the future of tourism and its innovation potential.

With the participation from private data companies, National Tourism Boards, National Statistics Offices, International Organizations such as UNWTO and OECD, Data producers (Google and Forward Keys), representatives from the tourism industry and Eurostat.

The discussion was quite rich and showed a common consensus on the role of data for helping to support recovery in the sector.

COVID-19 was (actually still is) a stress-test for the tourism industry and has brought several challenges to Governments, to the tourism industry and also to the data producers.

In fact, uncertainty became the rule for Governments and the private sector, challenging decision-making processes and frameworks.

Like never before, National Statistics Offices, Tourism Boards and private data producers witness a rise in demand for timely, robust and granular data.

The need to understand the crisis and its impacts but, more important than that, to understand the recovery process and the timing to put in place recovery strategies and investment policies, that imply new lines of work by the entire tourism data ecosystem (NSO, NTO, private companies) and the progress made during this period was also consensual.

The decision-making environment has changed significantly. The absence of historic data that helps to predict the future is followed by transformations in consumption habits and the intensification of the use of e-commerce in customers' consumption behaviour.

Big data can be an ally in delivering useful insights for business or policy decisions.

Discussing whether this big data could replace traditional data sources, the perspective was unanimous in the sense of complementarity between traditional sources (official statistics and consumer surveys) and new data sources (airline data, mobility data, bank cards data), which should evolve into an ecosystem of harmonious coexistence, that guarantees quality and trust.

On the other hand, this crisis has widened the scope of the data sets supporting decisions in the tourism sector - travel restrictions, health data but also CO2 emissions and complex set of sustainable tourism indicators such as water usage, waste production, energy efficiency, etc., are now current needs of the industry. It is essential to have clear and timely information that allows you to guide public and private investment decisions and evolve in terms of the tools to make this information available quickly, using data visualization tools or scoreboards.

This broadening of scope poses great challenges to the statistics system, which must adapt to this new environment and define a new framework, in which the production of statistics is collaborative, involving the public sector, private sector companies, private data producers and

universities and research centres. The case of the National Data Alliance in the Netherlands is an example of the way forward in this matter.

On the other hand, the effort to provide open data, both public and private, should be intensified, and investment in data and knowledge in the tourism sector should be promoted, as a condition to ensure the future competitiveness of the industry.

This means investing in the use of technology in the collection, analysis and dissemination of data, simplifying the administrative task of companies and improving the timeliness of the disclosure of such data, with gains in efficiency and transparency. The project presented by Statistics Portugal on the data collection process with direct connection to the companies' systems was another case discussed during the session.

While investing in the improvement of traditional systems for the collection of statistics, an effort should also be made in investigating the viability of new data sources and their potential use for statistical purposes or availability for decision making.

On the other hand, private data producers must also make progress in providing open data and tools that help companies and, in particular, for SMEs to increasingly use data in the management of their businesses, supporting them in terms of the effective use of that data.

And skills are a key element to address. The question of skills was widely discussed as a relevant issue. The use of these new data sources requires sensitive efforts to invest in infrastructure, but above all in terms of the ability to analyse that data and, not least, its transformation into value for the businesses and to support new business models development (innovation in new products, services, solutions, etc).

Invest in skills is clearly a priority of investment in the near future and a condition for competing in the global market.

Finally, a word for the importance of cooperation between international organizations regarding the updating and development of international standards that will allow to stabilize a modern tourism statistics framework that builds on existing data sources and responds effectively to the current and future needs of the sector.

A summary with the conclusions from this session was presented to the Directors General of the EU Member-States meeting the afternoon of 8<sup>th</sup> march, as a contribute for reflection in the incoming public policies, knowing that data is a valuable tool to acknowledge needs and predict trends.

The use of data will be one of the key vectors for building a more resilient and sustainable tourism ecosystem, being certain that the European Union must continue to be the No. 1 destination in the World.