Briefing

European Parliament

Major challenges for EU tourism and policy responses

SUMMARY

Constituting the third-largest economic activity in the EU, tourism is of considerable importance as a source of economic growth, regional development and employment. Although it has been badly affected by the economic crisis in the past years, tourism has proved resilient, as witnessed by the growing number of visitors to the EU over the years. Nonetheless, the industry is faced with a number of challenges and mounting competition, in particular from emerging non-European destinations, whose share in the global tourist market is gradually increasing. Because of its transversal nature, tourism is impacted upon by various policies, including those on transport, environment, consumer protection and regional development. These policies are not always easy to coordinate.

Since the entry into force of the Lisbon Treaty in 2009, the Treaty on the Functioning of the European Union (TFEU) allows the EU to support, coordinate or supplement the actions of the Member States in the domain. However, this legal advance has not led to a great impetus towards EU-level policy-making in tourism. Although EU legislation has progressively covered a number of fields in which the EU has exclusive or shared competency with the Member States (such as transport, transport security and passenger rights), tourism policy remains essentially nationally regulated.

In recent years, the European Commission has presented two strategies on tourism: 'Europe, the world's No 1 destination – a new political framework for tourism in Europe (2010)', in which it sets out the EU's priorities and actions regarding the sector, and 'A European strategy for more growth and jobs in coastal and maritime tourism' (2014). In a resolution from 2011, the Parliament made a number of suggestions for achieving a competitive modern and sustainable tourism. In 2015, the Parliament welcomed the 2014 European Commission strategy and called for the adoption of a number of additional initiatives to ensure that it is implemented in real terms.

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Background

Title XXII 'Tourism' (Article 195) of the Treaty on the Functioning of the European Union (TFEU) states that 'Union action shall be aimed at: a) encouraging the creation of a favourable environment for the development of undertakings in this sector; b) promoting cooperation between the Member States, particularly by the exchange of good practice.' This article also says that the European Parliament and the Council of the EU shall establish specific measures to complement actions within the Member States to achieve the above objectives, excluding any harmonisation of the laws and regulations of the Member States. These measures shall be adopted by the Parliament and the Council under the ordinary legislative procedure.

As tourism policy touches upon many other fields, such as commerce, provision of goods and services, transport and the environment, it is also affected by the relevant EU legislation covering them.

According to a 2010 Commission communication on 'Europe, the world's No 1 destination – a new political framework for tourism in Europe', tourism represents the third-largest socio-economic activity in the EU after the trade and distribution and construction sectors. Tourism has a considerable impact on economic growth and employment through spending in areas such as transport, accommodation, food and drink, entertainment, shopping and culture. To illustrate this point, the communication suggests that tourism directly generates over 5 % of EU GDP. When considering its effect on related industries, its overall impact is even stronger: it is estimated to generate more than 10 % of EU GDP and approximately 12 % of all jobs, many of which are within small and medium-sized enterprises (SMEs) – the vast majority of tourism businesses. Yet, despite its importance, tourism continues to face considerable challenges (see next section for details). So far, responses to these challenges have been dealt with at the national level, as a consistent EU tourism policy is still lacking. In addition, tourism does not constitute one of the main policy priorities of the European Commission.

The number of overnight stays in tourist accommodation, which reflects both the length of stay and the number of visitors, is considered a key indicator for tourism statistics. According to Eurostat, visitors spent 2.68 billion nights in EU‑28 tourist accommodation in 2014, which is a 1.5 % increase when compared with 2013. Figure 1 below shows the number of nights spent in tourist accommodation per NUTS 2 region in 2014; the longer visitors stay in certain regions, the deeper the blue colour marking these regions is. However, although present growth looks positive, EU tourism service providers are confronted with a number of important challenges that have to be addressed so that the EU can keep its position as the world's number one tourist destination.

Major challenges facing tourism

Sustainability

Sustainability constitutes one of the main challenges for tourism. As tourism includes transport to the destinations concerned, it leads to an increase in CO_2 emissions. Massive tourism may also lead to deterioration of natural resources, destruction of biodiversity, or noise pollution. In terms of spatial development, it may lead to the construction of large resorts that significantly alter the landscape.

Global warming, just like massive tourism, may render certain tourist destinations less attractive, for instance, by causing fires or deforestation). In the long term, rising sea levels could be a threat to insular and coastal territories. Loss of snow due to rising temperatures may also lead to the decline of winter ski resorts.

Political instability

Tourism is also susceptible to other factors, such as terrorist attacks and political instability and the economic losses they entail. For instance, the Paris terror attacks dramatically reduced tourist numbers in the French capital. Speculation on Grexit in 2012 pushed

Figure 1 – Nights spent in tourist accommodation establishments per NUTS 2 regions, 2014

(million nights spent by residents and non-residents)

EU-28 = 2 682
- < 2.5
- 2.5 – < 4.5
- 4.5 – < 6.5
- 6.5 – < 11.5
- >= 11.5
- Data not available

Administrative boundaries: © EuroGeographics © UN-FAO © Turksta
Cartography: Eurostat - GISCO, 04/2016

Data source: European Commission, Eurostat regional yearbook, 2016.

down tourist arrivals in Greece by 3.3 % in a single year, and political upheaval in the Arab world brought the market share of tourism down from 6.4 % in 2010 to 5.0 % in 2012.[1] Since the beginning of the Arab Spring, southern European countries seem to have profited from a rising number of tourists.

Competition from new non-European markets

Competition from other markets is yet another concern for EU tourist destinations. As more countries around the globe are stepping up their efforts to become accessible to tourists, more offer becomes available. Although an EPRS study using 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, it will meet severe challenges on the way, as its share is forecasted to fall from 60 % in 1995 to 41 % in 2030.[2] In addition, although Europe has the lion's share in terms of arrivals (52 %), it lags behind in the share of international receipts (41 %), that is, 'receipts from international visitor spending on accommodation, food and drink, entertainment, shopping and other services and goods'.[3] This is explained by the fact that those travelling within the EU tend to do shorter trips. For instance, according to EU statistics, short trips (one to three nights) account for more than half of the number of trips undertaken by EU-28 residents.

The emergence of new niche target groups

Attracting various niche target groups, such as seniors, may help to boost tourism. To this end, various tourist resorts have placed specially designed infrastructure at their premises (such as specially outfitted elevators and bathrooms), to facilitate seniors' stay. This may not always be an easy task, as it requires a careful redesign of spaces and financial resources. Similarly, some resorts have tried to adapt to the needs of tourists with special needs.
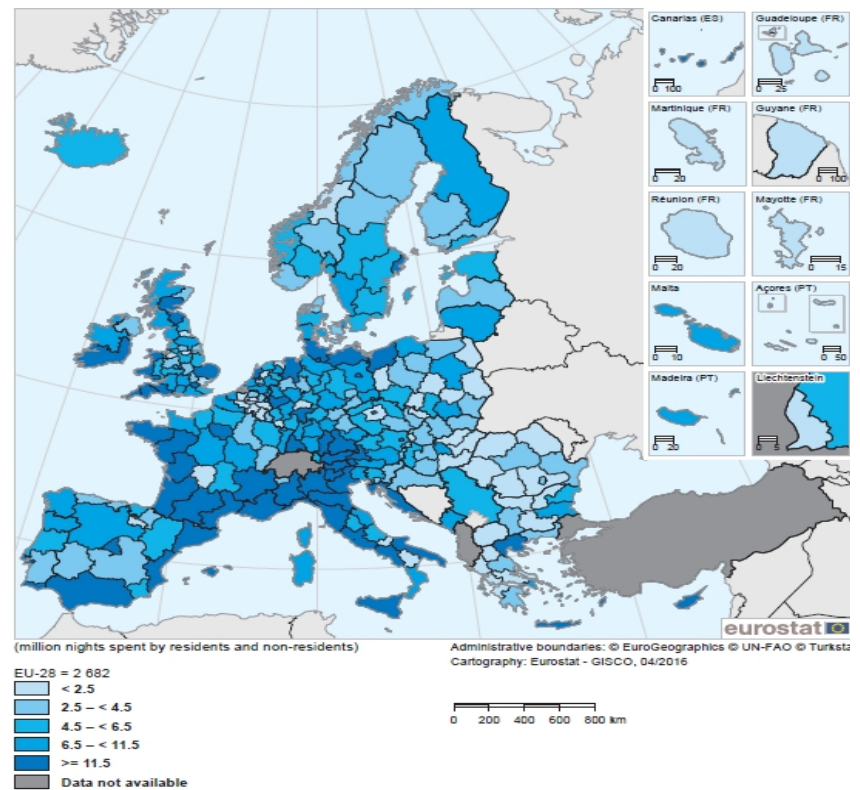
Demands for more sustainable tourism have led to the development of alternative forms of tourism, including eco-tourism, which aims to support locally owned resorts that are run in an equitable and environmentally responsible manner. Other such alternative forms include tourism for health, culture, religion, education, conferences, single travellers and LGBT persons.

Visa policies
Non-coherent and stringent visa policies constitute another obstacle to the development of tourism. 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.

Digitalisation and regulation of online services
Digitalisation of tourism services constitutes yet another challenge. A growing number of people use the internet to organise their holiday, book a transfer, a trip or accommodation services online. Furthermore, numerous smart devices are increasingly used to access various tourism-related services. The sharing economy has also brought new opportunities with new peer-to-peer services for accommodation and transfer. However, these developments also pose considerable problems in terms of regulation, taxation, supervision of the legally defined standards for service provision, and so forth. Tackling online fraud related to the services that various providers offer is also an important challenge.

The need for new services and a quality upgrade
Furthermore, as tourism is quite a competitive industry, European tourist providers need to engage in upgrading the quality of their products and services by improving and enriching them, or inventing new ones, in order to maintain their share in the global market. Branding destinations and a dynamic promotion of EU destinations may help to alleviate competition. The extension of the tourist season through the provision of new appealing holiday packages is yet another imperative, as EU tourism tends to be concentrated within the months of July and August.

Challenges at the local and regional level of administration
At the local/regional level, various challenges emerge in terms of strategic planning and management of tourism side-effects. Local and regional authorities (LRAs) have to accomplish various tasks, such as ensuring waste collection, dealing with the effects of the increasing scale of mass tourism, and protecting areas of natural beauty, at a time of economic austerity and cuts. Given that tourism jobs are usually low-paid, seasonal and of a high intensity, LRAs will have to invest in new vocational training and skills acquisition actions for locally employed personnel, in order to keep their human capital and better match tourism market requirements. 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.

The EU's policy responses

Tourism-related activities

In recent years, the Commission has presented two communications that are directly linked to tourism: 'Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe (2010), and 'A European strategy for more growth and jobs in coastal and maritime tourism' (2014). The 2010 communication identifies several priorities, which sum up the main challenges facing EU tourism:

- to stimulate competitiveness in the European tourism sector;
- to promote the development of sustainable, responsible and high-quality tourism;
- to consolidate the image and profile of Europe as a collection of sustainable and high-quality destinations; and,
- to maximise the potential of EU financial policies and instruments for developing tourism.

To help implement the above priorities, the communication sets out a list of 21 actions.

By contrast, the 2014 communication focuses on issues of growth and jobs in coastal and maritime areas. It includes 14 actions that the Commission will undertake in order to stimulate performance and competitiveness, promote skills and innovation, strengthen sustainability and maximise available EU funding in the field of tourism.

So far, the Commission has organised a number of conferences, studies, workshops and online platforms on issues related to tourism, such as the Virtual Tourism Observatory (VTO), the digital tourism network and the tourism business portal. It also supports various online campaigns to promote Europe as a tourist destination within Europe and abroad. Under the blueprint for sectoral cooperation on skills, the Commission is working on a strategy for skills development in the tourism sector, based on an industry-led approach.

EU-funded projects support pan-European and transnational tourism products. These include the promotion of transnational tourism routes (such as EuroVelo, an initiative that seeks to establish a sustainable trans-European network of cycle routes), itineraries and trails linked to cultural, sustainable and accessible tourism. The European destinations of excellence (EDEN) are also aimed at promoting sustainable development models across Europe. The EU supports and contributes to many cultural projects and events across Europe every year, including the designation of European capitals of culture. In addition, in order to facilitate access to funding, the Commission has published a guide on EU funding for the tourism sector (2014-2020).

In 2017, the Commission plans to support projects on transnational tourism products with a call for proposals exploiting synergies between tourism and the cultural and creative industries. The 2017 edition of EDEN will focus on cultural tourism. The Commission is also preparing the 2018 EU-China tourism year. In addition, in 2017, the Council, the Parliament and the Commission reached provisional agreement on a decision establishing a European year of cultural heritage in 2018, with a financial envelope of €8 million.

Consumer protection – enhancement of travellers' rights

There are various EU policies that directly affect tourism. For instance, Directive 2005/29/EC outlines various commercial practices that are prohibited in the EU and therefore helps consumers make informed choices when buying products, including tourism-related ones. Being a co-legislator with the Council and the Commission, in 2015

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the Parliament adopted a legislative resolution on package travel and linked travel arrangements. Consequently, package holidays, consisting of a flight, hotel or car hire and purchased online for an all-in price or through linked webpages, will get the same protection as packages bought from travel agencies. The resolution gives Member States two years to incorporate the new rules into their national law and a further six months to make them applicable.

The Parliament has also co-legislated on a number of issues concerning the rights of passengers travelling by air, rail, sea or inland waterways. Passengers travelling in the EU benefit from minimum standards for passenger rights across all modes of transport: delays, cancellations or denied boarding entitle passengers to assistance or a refund, or a compensation of between €250 and €600. Moreover, people with special or reduced mobility needs are entitled to free assistance for boarding and disembarking, during travel and in airports, stations and ports. Passengers on international services travelling 250 km or more, have additional rights, such as assistance, reimbursement or rerouting in case of delay or cancellation.

Other EU actions may also facilitate travellers. For instance, mobile phone roaming costs have decreased by 92 % since 2007 and will be abolished in June 2017. All European travellers will then roam like at home'. When it comes to driving a car, a valid driving licence issued in an EU country is recognised throughout the EU. Every new licence now being issued is in the form of a plastic card with a standard European format.

Purchasing products in an EU Member State

There are no limits to what EU citizens can buy and take with them when travelling within

the EU, as long as it is for personal use and not for resale. However, to determine whether tobacco and alcohol are for personal use, each EU Member State can set guiding limits and choose whether to apply a higher or a lower limit to travellers coming from outside the EU. The EU Ecolabel helps consumers identify products and services that have a reduced environmental impact throughout their life cycle, from the extraction of raw materials through to production, use and disposal. Recognised throughout Europe, the EU Ecolabel is a voluntary label promoting environmental excellence, which can be trusted. The scheme also covers tourist accommodation that complies with Ecolabel rules. Other EU labels also provide valuable information to consumers (see Figure 2).

Figure 2 – Label schemes

Cosmetic products have to indicate how long they can be used after opening. Check the open jar symbol.

Sunscreen products have clear labelling, including a standardised indication of UVA protection.

Marking on certain products such as toys, electrical products and mobile phones indicates that the manufacturer has certified that they meet all relevant EU safety, health and environmental protection requirements.

The EU Ecolabel is awarded to products that meet high environmental standards. It can also help you to identify environmentally friendly hotels, youth hostels or campsites.

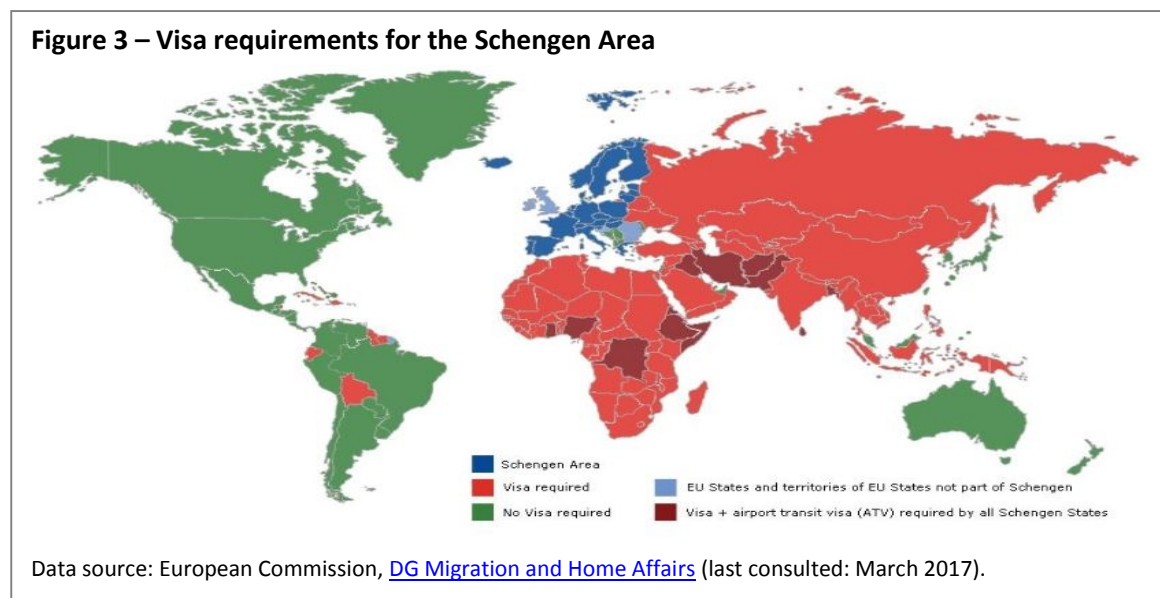Data source: European Commission brochure: Travelling in Europe 2016-17, 2015.

Visas

Visa arrangements may also increase the volume of travellers from various countries to the EU, or may have the opposite result: burdensome procedures may deter people from visiting Europe. As regards the EU's common visa policy, it is applied to the parts of its territory that constitute the Schengen area. The Schengen provisions abolish checks at

the EU's internal borders, therefore facilitating free internal movement of people, while tightening controls at the EU's external borders, in accordance with a single set of rules. As a result, both EU and non-EU nationals may freely travel within the Schengen area and are checked only when crossing the external border. Today, the Schengen area encompasses most EU Member States, except Croatia, Cyprus, Ireland, the United Kingdom, Bulgaria and Romania (the latter two are currently in the process of joining the area). Several non-EU states – Iceland, Norway, Switzerland and Liechtenstein – are also members of the Schengen area.

If there is a serious threat to public policy or internal security, a Schengen country may exceptionally temporarily reintroduce border control at its internal borders for, in principle, a period of no more than 30 days. Recent trends of immigration and terrorism have been the main causes for the reintroduction of border controls in various EU Member States. These temporary measures have provoked considerable concern for tourism destinations situated along a common border, as in the case of Germany and Austria.

Figure 3 below shows which country nationals need a visa when travelling to the Schengen area and which ones are exempt from it.

Figure 3 – Visa requirements for the Schengen Area

Schengen Area
Visa required
No Visa required
EU States and territories of EU States not part of Schengen
Visa + airport transit visa (ATV) required by all Schengen States

Data source: European Commission, DG Migration and Home Affairs (last consulted: March 2017).

In a 2016 communication on the 'State of play and the possible ways forward as regards the situation of non-reciprocity with certain third countries in the area of visa policy', the Commission claims that as regards Canada and the United States, full visa reciprocity with certain EU Member States has not yet been achieved. The Commission urges Canada and the United States to demonstrate their commitment by introducing tangible measures to achieve full visa reciprocity for all 28 EU Member States. The Commission also warns that, in the area of tourism, North American visitors could easily switch from the EU to other destinations. It claims that, as bookings are often arranged shortly before the intended journey, potential visitors would be unlikely to book trips to Europe due to their concern that the visa might not be issued on time. The communication also suggests that a potential decrease of 5 % – considered to be a conservative estimate – in the number of US/Canadian tourists to the EU, would represent a loss of €1.8 billion for the EU tourism sector.

Security and safety

Common EU rules on security controls for passengers, hand luggage and checked luggage apply to all flights departing from EU airports. EU rules lay down a list of items that are not allowed in the cabin of an aircraft and items that are not allowed in checked baggage for carriage in the hold. The EU also has set up an aviation safety policy to improve safety with regard to airlines originating from outside the EU. Their aircraft are inspected in Europe and are banned from operating inside European airspace if they are found to be unsafe or are not sufficiently overseen by their authorities. From November 2016, all non-EU airlines flying to the EU will have to hold an authorisation certifying their compliance with international safety standards. Similar EU rules cover the areas of maritime security and safety, and rail safety.

Health coverage

As an EU national, if you are suddenly taken ill or have an accident during a temporary visit to another EU Member State or to Iceland, Liechtenstein, Norway or Switzerland, you are entitled to use the public healthcare services on the same terms and at the same cost as the people insured in that country. However, each country has its own rules for public medical provision. The European health insurance card proves that you are insured in an EU Member State and is available for free from your national health insurer. It simplifies the procedures and helps to speed up the reimbursement of costs. In addition, 112, the Single European emergency number, can be used free of charge to contact the emergency services in any EU Member State from any fixed or mobile phone.

Furthermore, strict standards are set for EU bathing water to protect bathers' health and the environment. The overall water quality at the EU's 21 000 bathing sites remains high: more than 95 % meet the minimum water quality standards and 83 % meet the more stringent 'excellent' standard.

Pet protection

The EU has legislated on a number of issues regarding pet travel. Travelling with a dog, cat or ferret is easy with an EU pet passport, available from any vet. All dogs, cats and ferrets must have a passport and, for identification purposes, be fitted with an electronic microchip or have a clearly readable tattoo applied before July 2011. They must be vaccinated against rabies and have the details entered in their pet passport.

Possible use of EU funding opportunities for tourism-related activities

Various EU funding instruments may help to boost the prospects of tourism and to address its challenges. Depending on the prerequisites that each EU funding programme sets, many legal persons (such as public bodies, companies, SMEs, research organisations, universities, non-governmental organisations and tourism cluster initiatives) may benefit from these opportunities. However, there is no concrete EU fund for tourism as such. So far, Member States have used the EU funds to support activities that are not directly related to tourism. For instance, they have invested resources for building or maintaining various types of infrastructure, such as roads, ports, environment-related facilities, modern sewage and garbage treatment systems, that may facilitate travelling or alleviate pressures emerging from mass tourism. A number of funding opportunities for projects related to tourism can be explored though the existing ESI funds and other EU sources described below. The list is only indicative as further opportunities may arise in the future.

European Regional Development Fund (ERDF)

Tourism-related actions that may be eligible for ERDF support include, among other things, tourism-related research, technological innovation, clusters, development of ICT programmes, development of high value-added products related to niche markets (for instance, ecotourism, health, cultural, gastronomic and sports tourism), activities for connecting coastal regions to the hinterland, small-scale sustainable tourism infrastructure, promotion of entrepreneurship and vocational training activities.

Cohesion Fund

The Cohesion Fund (CF) is aimed at Member States whose gross national income (GNI) per inhabitant is less than 90 % of the EU average. The CF focuses on transport and environmental infrastructure. With regard to transport, it can support the trans-European transport networks (TEN-T) or other priority projects of European interest, as identified by the EU. It can also support infrastructure projects. In the field of the environment, projects related to energy (such as use of renewable energy) or transport (such as development of rail transport or strengthening of public transport), also qualify for CF support.

Agricultural Fund for Rural Development (EAFRD)

The EAFRD is applicable to rural areas and it aims, among other things, at contributing to farm diversification into non-agricultural activities, to developing non-agricultural SMEs in rural areas, to sustainable and responsible tourism, and to restoring and upgrading the cultural and natural heritage of villages and rural landscapes.

European Social Fund (ESF)

The ESF can be used to support training of company staff in case of restructuring or a lack of qualified workers, as well as training of people in difficulty or from disadvantaged groups, to get better skills and jobs. It can also support mutual learning, creation of networks, and the dissemination and promotion of good practices in the domain of social innovation.

European Maritime and Fisheries Fund (EMFF)

The EMFF supports the promotion of economic growth, social inclusion and the creation of jobs. It also supports labour mobility in coastal communities and the diversification of activities within fisheries and into other sectors of the maritime economy. It can also support studies, conferences, networking activities and the acquisition of new professional skills enabling professionals from the fisheries sector to enter into tourism activities or to carry out complementary activities in the field of tourism.

LIFE programme

LIFE supports environmental and nature conservation projects throughout the EU. The priority areas of its sub-programme for the environment are: environment and resource efficiency, nature and biodiversity, and environmental governance. Protection of particularly ecologically important areas may also be eligible for LIFE support.

Creative Europe programme

The Creative Europe programme consists of three sub-programmes: 'Culture', applicable to the cultural and the creative sectors; 'Media', for the audio-visual industries; and the 'Cross-sector' one, for joint projects between the cultural/creative sectors and the audio-visual industries. The programme encourages the development of transnational projects and cooperation networks. The European capitals of culture initiative is also part of the programme.

EFSI and other opportunities

The European Fund for Strategic Investments (EFSI) supports SMEs and mid-caps, utilities, public sector entities, banks and investment funds. It can be further explored to fund tourism-related businesses. Companies active in the field of tourism may profit from various other programmes. For instance, COSME promotes entrepreneurship notably thanks to the Erasmus for young entrepreneurs exchange scheme. Educational activities related to tourism may benefit from Erasmus+, aimed at boosting skills and employability as well as modernising education and training. Erasmus+ also supports the organisation of European sports events. Academic research projects related to tourism can be implemented through the Horizon 2020 programme. The new programme for employment and social innovation, EaSI, may also be useful.

> To facilitate the gathering of information about the above programmes and possibilities, the Commission has prepared a special guide on EU funding for the tourism sector (2014-2020).
>
> EPRS has also prepared a guide to EU funding 2014-2020, covering major sources of EU funding by relevant sector.

The European Parliament's position

The Parliament's Committee on Transport and Tourism (TRAN) has a Tourism Task Force, which focuses on tourism-related issues. In April 2015, TRAN organised a hearing, bringing together major industry stakeholders to discuss ways to keep Europe's position as the world's top tourism destination.

In a 2015 resolution on 'New challenges and concepts for the promotion of tourism in Europe', (rapporteur: Isabella De Monte, S&D, Italy), Parliament encourages the Commission to examine the possibility of creating a section within the next multiannual financial framework (MFF), dedicated exclusively to tourism, and calls for a new Commission strategy on EU tourism to replace or update the 2010 communication. It insists on stepping up efforts to improve Europe's branding as a tourist destination and on creating pan-European and transnational tourism products and services. It makes suggestions on achieving high-quality tourism products and on unlocking the potential of coastal and marine tourism. The resolution calls on the Commission to promote sustainable, responsible and eco-friendly tourism in cooperation with strategic partners. Analysing the challenges emerging from the sharing economy, it recommends that consideration be given to establishing an appropriate regulatory framework. Finally, it offers a number of possible ideas for promoting further digitalisation in tourism-related businesses.

In its 2011 resolution on 'Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe' (rapporteur: Carlo Fidanza, EPP, Italy), Parliament makes a number of suggestions for achieving competitive modern and sustainable tourism. It deplores the lack of coherence within the Commission with regard to tourism policy and considers it essential that the Commission should arrange for a coordinating and integrating approach among the directorates-general concerned. Furthermore, it suggests developing a long-term strategy for more coordinated and simplified visa procedures. Last but not least, it asks the Commission to promote a specific initiative to gradually harmonise the accommodation classification systems (such as hotels, guesthouses, rented rooms), through the identification of common criteria.

Advisory bodies and stakeholders

In its 2016 opinion, on 'Age-friendly tourism', the Committee of the Regions (CoR) calls on the Commission to make senior tourism central to the digital agenda for Europe and to consider declaring a European year of tourism, which would help promote the diversity of European tourism. In a 2016 own-initiative opinion on 'Tourism as a driving force for regional cooperation across the EU', it calls on the Commission to launch an integrated EU tourism policy. It suggests adopting a standardised European classification/quality assurance system to complement existing national ones, and creating a European capital of smart tourism award. Finally, it supports introducing a heading for activities related to promoting European tourism in the annual EU budget, and in various EU policies and funds.

In its 2014 opinion on a 'European strategy for coastal and maritime tourism', the CoR underlines the need to underpin the EU's strategic goals with adequate funding opportunities and for European coastal and maritime regions to develop local strategies aimed at promoting distinctive local features. It calls upon the Commission to take into account the fact that islands, outermost regions and other remote locations are highly dependent on air transport, ferry and boat connections. Moreover, it argues for specific measures to support the local economy and resources. In its 2011 opinion on a 'New political framework for tourism in Europe', it welcomes the Commission's desire to deal with tourism policy in a coordinated manner. It stresses the important role played by local authorities in relation to the sustainable management of tourist destinations. It also notes the impact of structural problems, such as climate change and the shortage of water and energy resources in European tourist destinations, particularly in the islands and outermost regions.

The European Economic and Social Committee (EESC) has also covered issues related to tourism in a number of opinions. A 2013 EESC opinion on 'Nautical industries: restructuring accelerated by the crisis', states that the Mediterranean Sea accounts for over 70 % of the world's nautical tourism, which creates very significant spill-over benefits for its coastal countries. This form of tourism is hampered by differing national laws in areas, such as the registration of recreational craft, navigation licences and safety and tax measures. In an opinion from 2011 on 'A new political framework for tourism in Europe', the EESC pushes for improvements to connections and communications, encourages the promotion of tourism for health, wellbeing and culture tourism, and of tourism founded on an interest in wine, food, history or religion. The opinion advocates enhancing the quality of professional services and ensuring stable employment, and asks Member State governments to support the development of small companies and micro-businesses in the tourism sector that reflect the traditions of each region. It calls for a common EU advertising strategy and the introduction of a vocational certificate for tourism professions in the EU that is recognised by all Member States. It also asks for the adoption of measures to avoid structural unemployment in tourism businesses.

In 2015, the European Travel Commission (ETC), a non-profit organisation responsible for the promotion of Europe as a tourist destination in third markets, along with many other public and private tourism stakeholders, signed a tourism manifesto that calls for a holistic EU approach to tourism and sets out eight European policy priorities for the travel and tourism sector in the coming years. These are: competitiveness, digitalisation, good governance, joint promotion for destination Europe, reduction of seasonality, skills and qualification, sustainability and transport connectivity.

Outlook

There are various EU initiatives supporting tourism, which are aimed at bringing stakeholders together to dialogue, creating networking and good practices platforms, and facilitating funding information. Policies in the field of transport, consumer protection and visa are also shaping the fortunes of tourism. At the same time, although tourism is a vibrant economic sector of the EU, it still lacks a cohesive framework of full-fledged EU actions and policies. This comes as no surprise, as the legislative framework within which the EU operates is limited, allowing it to take only actions supplementary to those of the Member States in relation to tourism. 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. 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.

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