NECSTouR Position Paper on the Future European Tourism Strategy (2026)

Executive Summary of Key Recommendations

To ensure that the future European Tourism Strategy empowers regions to lead the transition toward a sustainable, competitive, and resilient tourism ecosystem, NECSTouR recommends the following strategic priorities:

➢ **Establish a dedicated EU budget line for tourism post-2027**, providing long-term, stable funding to public actors and territorial networks with a proven commitment to sustainability, climate action, and local economic development.

➢ **Ensure that tourism is fully included in the European Commission's new political priorities.** As the EU advances the Clean Industrial Deal, tourism must be recognised as a strategic sector that supports circularity, clean mobility, energy efficiency, territorial cohesion, jobs and growth: key drivers of Europe's competitiveness and economic security.

➢ **Revaluing Tourism as a Structural Transition Tool:** By promoting regenerative tourism practices, which go beyond impact mitigation, the sector will contribute actively to cultural and biodiversity restoration, environmental resilience, and the well-being of local communities.

➢ Positioning Cultural Tourism as a Core Pillar of the **New European Bauhaus**

➢ **Supporting regional and local authorities in the implementation of their climate action plans for tourism** by building on the operational NECSTouR climate hub to contribute to the objectives of the Glasgow Declaration and the EU**.**

➢ **Integrate sustainable tourism mobility into EU transport policy**, ensuring that visitor transport and logistics are decarbonised, multimodal access to destinations is improved, and tourism planning is aligned with clean mobility solutions, in line with the objectives of the European Green Deal and the new Clean Industrial Deal.

➢ **Place data and digitalisation at the heart of the strategy** by consolidating the future European Tourism Data Competence Centre (ETDCC) to empower destinations to systematically measure for **better decision-making and smarter visitor flow management** and combining official statistics and big data consistent with the European Tourism Data Space.

➢ **Foster tourism digitalisation and broader innovation** by connecting and scaling up the digital innovation hubs for sustainable tourism, embedding AI to tourism operations and other existing initiatives.

➢ **Supporting the development of innovative education and training programmes tailored to tourism's green and digital transition,** in line with the objectives of the EU Pact for Skills and aimed at building a future-ready, resilient, and skilled workforce.

➢ **Engaging Residents:** Local populations must be involved in tourism planning, ensuring policies align with their needs and fostering a deeper connection between communities and visitors.

- ➤ **Ensuring territorial cohesion and solidarity** by supporting regions whose tourism economy has suffered due to proximity to war zones or geopolitical instability. These territories must be supported to reorganise their tourism offer and should be integrated into the long-term recovery and transformation efforts foreseen by the future strategy.
- ➤ **Supporting and relying on regional cooperation platforms**, such as NECSTouR, as key partners in the design and implementation of EU tourism policies

These recommendations are grounded in the concrete experience of 45 European regions working through NECSTouR. They reflect the urgent need to rethink tourism policy in light of Europe's climate goals, geopolitical context, regional disparities, and the transformative agenda of the next EU mandate.

I. The Needs of the Tourism Sector

Tourism is a European success story of providing jobs and growth to our continent, but it faces many known and emerging challenges. Regional and local authorities need support and adequate funding to address issues such as unbalanced tourism flows, climate change, the digital transition, skills shortages, and other structural weaknesses, and to maximise the positive value of tourism as a source of prosperity.

The Role of Regions in EU Policy Delivery
Local and regional authorities enact approximately 70% of EU legislation, making them key stakeholders for delivering EU policy goals. Regions are at the forefront of delivering policies and programmes developed at the EU and national levels. Tourism affects many policy areas, from transport to housing, the environment, economy, social cohesion, entrepreneurship, employment, culture, and education.

Balancing Growth and Local Impact
Marketing Europe as a destination of choice to third countries is a dual-edged sword: while it creates economic growth, it also adds pressure on social and environmental systems at the local level. For tourism to remain beneficial and valued by local communities, more attention must be paid to supporting intra-European and regional tourism flows. It is also essential that all levels of governance work together, from the EU to the local level, to guarantee coherent and effective delivery.

Climate-Vulnerable Destinations Need Integrated Support
Tourism destinations increasingly face the dual challenge of adapting to the impacts of climate change while also working to reduce their emissions and achieve climate neutrality. Coastal regions confront rising sea levels and erosion; mountainous areas experience shrinking snow cover and altered ecosystems; southern destinations are exposed to extreme heat and water scarcity. These climate-related pressures jeopardise not only natural assets but also infrastructure, seasonality, and local economies.

Tourism strategic sector of the Clean Industrial Deal
The tourism sector also has specific needs within the broader context of Europe's industrial decarbonisation. As the EU advances its Clean Industrial Deal, tourism must be seen as both a beneficiary and a contributor to this transition. Investments are needed to decarbonise the tourism value chain, including accommodation, food services, mobility, and cultural and leisure infrastructure through energy efficiency, renewable integration, circular economy models, and digital innovation. Tailored support measures must be designed to allow tourism SMEs, regional operators, and public tourism infrastructure to contribute to the EU's clean industrial ambitions while maintaining competitiveness and service quality.

Skills and Talent Development for a Resilient Tourism Workforce
The tourism sector is facing an urgent need to close the growing skills gap, which threatens its resilience and capacity to adapt. As the sector undergoes rapid transformation driven by digitalisation, climate imperatives, and shifting visitor behaviours, tourism professionals require new competencies from data analytics and AI-based destination planning to circular economy practices and low-carbon service delivery. At the same time, the sector struggles to attract and retain talent, in part due to a lack of quality career pathways and evolving skills demands that are not fully reflected in existing training systems.

Impact of Conflicts on Tourism Regions
Some European regions are currently facing a collapse in tourism flows due to their proximity to war zones or geopolitical tensions, such as the Polish border regions affected by the war in Ukraine. These territories are often excluded from international tourism circuits, regardless of their safety and attractiveness. In such contexts, regional economies are disproportionately impacted, and tourism businesses struggle to survive.

Need for a Multilevel and Long-Term Framework
A coordinated, multi-level governance approach is needed, with regions playing a full and active role in shaping and delivering the future strategy. To do this effectively, the sector needs long-term investment, a clear governance framework, support for climate adaptation and mitigation, robust data, and a system that values territorial diversity. Tourism actors must also move beyond minimising environmental damage and take steps towards regenerative tourism models, which can actively contribute to ecosystem restoration and community resilience.

Supporting Sustainable Tourism Financing
Financial mechanisms, including targeted funds and reformed tourism taxes, should support sustainable transitions, particularly in regions affected by environmental degradation.

II. Expectations for the Future European Tourism Strategy

The future EU tourism strategy must adopt a sustainable, inclusive, and resilient approach, firmly embedding tourism within the broader framework of European priorities such as climate neutrality, digital transformation, territorial cohesion, and the clean industrial transition. Tourism is not only a major economic sector, but also a vector for social, cultural, and environmental transformation across Europe's regions.

Its strategic value lies in its capacity to drive innovation, strengthen regional economies, preserve cultural and natural heritage, and foster a sense of European identity. It must therefore be attuned to key EU objectives, including the European Green Deal, the Clean Industrial Deal, the Digital Decade, and the New European Bauhaus.

The next strategy should move beyond traditional metrics of volume and growth, and instead adopt a systemic, impact-oriented perspective. Tourism policies must account for environmental limits, the well-being of host communities, and the resilience of local ecosystems.

This shift implies placing **sustainability and regeneration at the core** of EU action, establishing a harmonised set of policy-oriented sustainable tourism indicators-policy oriented to measure the socio-cultural, environmental and economic dimension of tourism sustainability. The promotion of **regenerative tourism** should be a cornerstone of the EU's vision: this means going beyond merely reducing negative impacts, and actively restoring biodiversity, natural ecosystems, cultural assets, and community well-being.

Local and regional authorities must be recognised as **essential actors** in the implementation of this strategy. They hold the territorial expertise, planning competencies, and direct link with local communities needed to translate European ambitions into operational results. These authorities should be provided with the necessary tools, financial, digital, and regulatory, to manage tourism in a balanced, adaptive, and participatory way. The meaningful engagement of residents in tourism planning is key to building social acceptance, preventing conflicts over land use and housing, and improving the overall quality of the visitor experience. Tourism strategies must aim to treat visitors as temporary residents and integrate tourism into long-term territorial development policies.

To support this shift, the European Commission should recognise the strategic role of established **territorial cooperation networks** such as NECSTouR, AER, CPMR, CityDNA, ETC and the European Tourism Manifesto Alliance. These networks bring long-term expertise, peer-learning structures, and multilevel coordination capacities that cannot be replicated by short-term consultancy contracts.

A **dedicated EU budget line for tourism** is a critical enabler of this strategic vision. The European Parliament has already called for such a line in the post-2027 Multiannual Financial Framework. Funding must be stable, long-term, and aligned with sustainability and innovation objectives. In addition, **reformed financial instruments**, such as tourism taxes or dedicated transition funds, should be used to finance local investments in climate adaptation, green

infrastructure, and visitor management especially in territories exposed to over-tourism, depopulation, or geopolitical shocks.

The **EU Tourism Data Competence Centre** must be recognised as a strategic, long-term instrument to operationalise the European Sustainable Tourism Strategy. It will support DMOs and SMEs in their data-driven journey, allowing the tourism ecosystem to deliver the green and digital transition. This support will target delivering a common methodology for sustainable tourism indicators, policy-oriented, practical tools, and direct technical assistance for destinations and SMEs. The Competence Centre will partner with public and private entities, whose expertise is required to deliver its capacity-building programme. As such, the Competence Centre will generate the necessary capacity for the tourism ecosystem to benefit from the future European Tourism Data Space.

It is also indispensable that the European Statistical System incorporates the **statistical needs of tourism destinations**, in line with the UN Tourism Statistical Framework (MST-SF). This includes a harmonised set of sustainability indicators with comparable subnational data, making the Tourism Satellite Account (TSA) mandatory for all EU Member States, and integrating the TSA with the System of Environmental-Economic Accounting (SEEA).

In parallel, **skills development and workforce transformation** should be supported through EU investment in education and training tailored to tourism's green and digital transition. Lifelong learning opportunities and partnerships between regions, education providers and businesses are essential to attract talent and ensure high-quality, future-proof jobs.

The EU must also scale up its support for **regional climate action** in the tourism sector. While many European regions have endorsed the Glasgow Declaration, they face operational and financial challenges in implementing it.

Finally, **sustainable tourism mobility** must be fully integrated into both transport and tourism strategies at each level of governance.

By embedding tourism in the EU's key transformation agendas and reinforcing local capacities, the EU can make tourism a more effective lever for sustainability, cohesion, and innovation. In doing so, tourism also **boosts Europe's competitiveness by driving green innovation, quality services, and territorial attractiveness.**

III. NECSTouR in action

A Trusted Network with Regional Expertise

NECSTouR, the Network of European Regions for Sustainable and Competitive Tourism, represents 45 regions from across Europe and a further 32 tourism research institutes, universities and sector intermediaries. Operational since 2007, it is well placed to articulate the views of sub-national authorities and share a clear understanding of their needs and capacities. NECSTouR underlines that regions are not only implementers, but also strategic partners and innovation drivers.

Consultative and Co-Creation Processes

This Position Paper has been developed through a process of consultation with NECSTouR members, coordinated via the Tourism Advocacy Group, the thematic hubs (governance, climate, data) and a high-level discussion with the Head of the Tourism Unit at DG MOVE during NECSTouR's Annual General Meeting in Milan on 21 May 2025. It draws on the co-creation process that shaped the "NECSTouR 2030 Pathway", a strategy under implementation across the network's thematic hubs with clear targets through to 2030.

Climate Leadership at Sub-National Level

As signatories to the Glasgow Declaration, NECSTouR and its members are already fostering the development and implementation of sub-national tourism climate action plans through the NECSTouR Climate Hub. This structure provides coaching, a digital platform, and access to shared knowledge to support regional authorities in developing and applying effective measures. NECSTouR wishes to scale this service up and extend it beyond its current membership.

Data Intelligence for Tourism Decision-Making

NECSTouR's Tourism of Tomorrow Lab is entering its fourth year of support to member regions. It helps them understand and take advantage of data opportunities, including artificial intelligence, and improve tourism decision-making. Today, 10 destination managers from across Europe are applying these methods directly in their territories. Around 35 other DMOs benefit from the collaborative knowledge of the frontrunners through structured peer learning.

Operationalising the EU Tourism Data Strategy

NECSTouR is also a key partner in the two main European tourism data-focused initiatives. NECSTouR's Tourism of Tomorrow Lab is inspiring the purpose, concept and methodology of the D3HUB project, which is testing the design of the future European Tourism Data Competence Centre. This instrument, expected to be self-sustainable by the end of 2026, should be a cornerstone of the new strategy. D3HUB is currently piloting four thematic clusters involving 40 European DMOs: smart visitor flow management; balancing resident and visitor needs; climate change (mitigation and adaptation); and attracting quality tourism to emerging destinations. The DEPLOYTOUR project is designing the future European Tourism Data Space for the benefit of destinations, tourism SMEs and the broader private sector.

Sustainable Tourism Mobility
NECSTouR and its members are also active in advancing sustainable tourism mobility. This means treating tourists as temporary residents and ensuring that the transport system supports this quasi-status. Regional members are addressing first- and last-mile challenges, enhancing low-carbon access to cultural and natural heritage, and integrating tourism-related logistics (such as freight for hotels, events and restaurants) into decarbonised urban logistics planning. Tourism professionals are being trained to consciously design and market travel packages that incorporate sustainable transport options. All of these efforts contribute directly to the goals of the European Green Deal and the EU's decarbonisation pathway.

Supporting Destination Management and Governance
NECSTouR's Governance Hub has also identified destination development, destination management, and conscious marketing as key areas that regional authorities must address to anticipate future opportunities and risks. These areas are being worked on collectively, with tools and experiences shared across the network to build capacity and accelerate progress.

Conclusion

NECSTouR calls for an EU tourism strategy anchored in sustainability, resilience, and cohesion. This requires a dedicated EU tourism budget line, integration of tourism into the Green Deal and Clean Industrial Deal, and recognition of the sector as a key driver of Europe's transition.

Strategic tools must include the European Tourism Data Competence Centre (building on D3HUB), the integration of sustainable mobility into transport policy, and targeted support for regional climate action, skills development, and regenerative tourism.

To support this shift, the European Commission should recognise the strategic role of established territorial cooperation networks—such as NECSTouR, AER, CPMR, CityDNA, ETC, and the European Tourism Manifesto Alliance—which have demonstrated long-term expertise, peer-learning systems, and multilevel coordination capacities, and can ensure the legacy of the European strategy in its territory.

With the optimum policy framework and investment, tourism can become a powerful lever for Europe's green, digital, and inclusive transformation—and NECSTouR stands ready to lead that transition and maximise the positive power of tourism for the benefit of business, visitors, communities and the environment.

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