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

Working together for the future of European tourism

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I. INTRODUCTION

Tourism is an important economic activity in the European Union (EU). It comprises a wide variety of products and destinations and many different stakeholders are involved - both public and private - with very decentralised areas of competence often at regional and local levels. Tourism has great potential as regards contributing to the achievement of several major EU objectives, such as sustainable development, economic growth, employment and economic and social cohesion. A more detailed description is given in Chapter II of this Communication. These elements and the fact that many Community policies have a significant effect on the various activities of the tourism sector justify renewed political attention on the part of the main EU political institutions.

The recent terrorist attack in the United States, with its direct consequences, including the fear of air travel, and its indirect effects on the whole tourism sector, illustrates just how much this sector depends on external influences. This document does not intend to provide a rapid reaction to these recent events. In fact, it does reflect a long process of thought and consultation aimed at shaping a new approach for EU tourism.

The process initiated in the follow-up to the Conclusions of the Council of 21 June 1999 on the subject of "Tourism and Employment" and encouraged by the reactions of the other institutions¹, has generated a new momentum among the main stakeholders concerned (Member States, the tourism industry, civil society and the Commission). On the basis of a co-operative approach and partnership, as described in Chapter III, a series of priorities and measures have been identified to be taken by the various public and private stakeholders in the sector, bearing in mind their respective areas of competence and responsibilities, with particular emphasis on the areas proposed by the Council.

The purpose of this Communication is to consolidate this new process by proposing, as described in Chapter IV:

- an operational framework based on the method of open co-ordination between all the stakeholders concerned developed at the Lisbon European Council. It is also in tune with the guidelines of the recent White Paper on European Governance², for which tourism is a suitable area of application: its implementation will require commitment at the relevant high level.
- A limited number of measures to be introduced by the various stakeholders in the tourism sector, with the aim of increasing the basic knowledge of this economic activity, increasing the competitiveness of its businesses and improving the sustainable development of tourism in the EU and its contribution to job creation.

¹ Resolutions of the European Parliament, 18.2.2000, A5-0030/2000.
Opinion of the Economic and Social Committee, 26.1.2000, CES 93/2000 - OJ 2000/C-75 of 15.3.2000 p. 37.

² Opinion of the Committee of the Regions, 15.6.2000, CdR 291/99 final.
COM(2001) 428 final of 25.7.2001

II. IMPORTANCE OF TOURISM IN THE EUROPEAN UNION

1. Statistics and trends

Economic importance and general trends

The tourism industry in the European Union comprises some two million businesses, mostly SMEs, which account for about 5 % of both GDP and employment. This figure varies from 3 % to 8 % depending on the Member State. Tourism also generates a considerable amount of activity in other sectors, such as the retail trade and specialised equipment, to a level of around one and a half times that of tourism itself.

Despite the importance of SMEs in this sector, there is a growing trend towards concentration, strengthening the vertical integration of tourist services. This is particularly noticeable in the hotel sector and services which organise travel and transport.

In terms of turnover, over 80 % of the tourism undertaken by Europeans concerns individuals or families. The remainder is business tourism, in the broad sense. It varies, depending on the country, from barely 15 % to over 30 % of the total volume, the highest proportion relating to Nordic Countries. EU households earmark around one eighth of their personal expenditure for tourism-related consumption, a figure which varies relatively little from country to country.

Community tourism is largely domestic. 87 % of tourism activity recorded is attributed to its own citizens with only 13 % to visitors from non-member countries. As for the tourism of EU citizens, three-quarters remain within the EU, the remaining quarter going to other parts of Europe and the world.

Tourism is one of the sectors of the European economy with the best outlook. Forecasts indicate a steady growth of tourism in Europe, stronger than the average economic growth. This is due to factors such as the increase in time for leisure activities and its social importance, together with global economic growth. In terms of the absolute volume of expenditure and employment, both current growth and that of the last decade exceed an annual level of 3 %, with an even higher rate for tourism-related sectors. This is due to tourist demand forever more varied, comprehensive services and increasingly active leisure activities. Over the past few years 100 000 jobs a year have been created in Europe in the hotel and restaurant sectors alone.

Europe, with the greatest diversity and density of tourist attractions, is the most visited tourist region in the world. Despite having a lower growth rate than the world average and than certain up-and-coming overseas destinations in particular, the volume of European tourism is expected to double over the next 20 to 25 years, with a net increase, in terms of expenditure and yield, of around 3 % per year. Employment will rise by about 15 % over the next ten years. If current trends continue, the above-mentioned growth will continue to be higher in activities enjoying spin-offs from tourism than in the tourism industry itself. These effects vary of course considerably between the different European countries.

Demographic factors and further evolution

Changes in the demographic structure of Europe will have a major impact on leisure tourism. By 2020, the population aged over 65 years will have increased by 17 million compared with today. This figure will continue to grow, with the population enjoying better health, a higher life expectancy and greater affluence than previous generations. In addition, people aged

between 50 and 65 years, who are generally liberated from their family obligations, very mobile and often in a good financial position, will be more important to the tourism market.

Alongside this significant growth in tourism, there will be a change in demand regarding the type of tourism. Tourism concerning cultural and natural heritage is expected to grow most. Many tourists however have special needs which need to be catered for to enable them to fully benefit from tourism. Apart from the 10 % of the population recognised as handicapped in one way or another, a growing number of tourists can be expected to suffer from reduced mobility as a result of a temporary disability or age.

One of the main problems of leisure tourism in Europe is its concentration on specific, restricted periods of the year. This leads to poor working and employment conditions with negative effects on qualification levels, service quality and business competitiveness, along with the saturation of the communication infrastructure and tourist facilities. The expected increase in the number of over-fifties should help reduce the concentration of tourist activity during peak periods, particularly school holidays, and improve the staggering of the tourist season.

Similarly, the deregulation of transport services and the development of transport networks, the increased efficiency of the single market and the growing availability of information society tools, will, by increasing the demand for tourist activities and services, continue to promote the mobility of citizens and contribute to the growing internationalisation of tourist flows. For visitors from non-member countries, the single currency will increase price transparency and make Europe even more attractive as a destination. This can be used as a further selling point for Europe.

Main challenges

European tourism, its businesses and destinations, are faced with major challenges which are both opportunities and threats. First there is the continuation of significant growth in tourism demand and the volume of tourism in Europe, along with diverging developments in the various types of tourism. An appropriate response to these changes may be found only through the emergence of new types of tourism.

Some challenges are of key importance: the lack of skilled manpower for certain jobs, mainly because of the working conditions; the development of transport and its effect on flows, service quality, sustainable development and environmental protection; and the adoption and incorporation of new information and communication technologies as a factor of competitiveness.

2. Specific features of the tourism sector

Tourism is a service sector with a particularly complex product which depends on an extremely fragmented supply. Each link in the chain (travel agencies, tour operators, carriers, hoteliers, restaurateurs, etc.) offers one element in the overall product. Together, these components determine tourists' experiences and their appreciation of the quality of the service. The tourist destination is the main place of consumption of tourist services and, therefore, the location and place of activity of tourist businesses. Tourists identify the product with both the businesses providing a service and the destination visited.

Given that, in the main, tourism activity does not meet a vital need, tourist behaviour is particularly volatile and subject to psychological and social influences, personal sensitivities

and short-term reactions. If the image of just one link in the chain is affected, it is the whole tourism chain that suffers the consequences! The foot-and-mouth epidemic and the various oil slicks that have affected European coastlines in the recent past have already shown the negative effect of a current event on the image of a tourist destination or region, to the immediate detriment of the tourism industry.

The tourism product is extremely diverse. Natural and cultural resources, tourist facilities, the communications infrastructure, accommodation and restaurants are the basic resources of a tourist destination. The combination of local tourism resources and the services offered determines the type of tourism to which a destination belongs, such as coastal or mountain tourism, sport or religious tourism, thermal or gastronomic tourism and, of course, business tourism.

In addition, vertical interdependence between tourism businesses is more pronounced than in most other sectors of the economy. Such interdependence, which also exists at world level, results in what are sometimes complex structures and trends in commercial relations. Apart from businesses and their representative organisations, destinations, with their different activities, combining public and private interests, are important stakeholders.

Because of its diversity and fragmented nature, the tourism sector has no clear identity. This may, in part, explain why tourism has featured little at a political level, compared with its economic and social importance.

The diversity of the business environment and the public and private stakeholders involved in tourism, its effect on many other economic activities, its very wide social and emotional dimension and the geographically dispersed and very variable consumption of the product mean that tourism is of a very pronounced horizontal nature. A large number, if not the majority, of political fields may directly affect it considerably, such as those for enterprise, transport and regional development. The annual report on Community measures affecting tourism (2000)³, which the Commission drew up at the same time as this Communication, provides detailed information on this subject.

Article 3(u) of the Treaty establishing the European Community provides for Community action to comprise measures in the field of tourism for the purposes set out in Article 2 of the Treaty. These include, in particular, sustainable development and growth, a high level of employment, social and economic cohesion and the convergence of economic performance, along with raising the quality of life and European integration.

More specifically, tourism contributes to a large extent to the objectives of enterprise policy. The diversity of products and services, the different locations and the development of the market towards a sustainable tourism, open to everyone, will lead to the creation of new markets for innovative enterprises, especially SMEs. The great diversity of jobs offered in this sector may provide young people with their first access to the job market, help combat social exclusion and promote equal opportunities at all levels of responsibility.

Tourism is an important aspect of the quality of life of EU citizens, which could be further improved by promoting sustainable, high-quality, competitive tourism in Europe, while

³ In accordance with Article 5 of Council Decision 92/421/EEC of 13 July 1992 on a Community action plan to assist tourism, OJ L 231 of 13.8.1992, p. 26, since 1994 the Commission has published a series of reports on Community measures affecting tourism: COM(1994) 74 final of 6.4.1994, COM(1996) 29 final of 5.2.1996, COM(1997) 332 final of 2.7.1997 and COM(2001) 171 final of 28.3.2001.

respecting the carrying capacity of its natural and cultural areas, especially Natura 2000 sites. It also brings European citizens closer together as they discover and share common European values.

The measures recommended in Chapter IV are in keeping with the strategic objective of aiming to make the European economy the most competitive and dynamic knowledge-based economy in the world (*e-Europe* action plan). Tourism is a priority area for the use of Information and Communication Technology (ICT), both by industry (interaction between stakeholders, new services) and the consumer (access to appropriate mobile services).

III. THE NEW CONTEXT OF EUROPEAN TOURISM

1. The "Tourism and Employment" process

In November 1997, a European Conference on Tourism and Employment⁴ was held in Luxembourg shortly before the Luxembourg European Council on Employment⁵ and the Council of Tourism Ministers of 26 November 1997⁶. It recognised the benefits of achieving the balanced, sustainable development of European tourism and called for more far-reaching action in response to the Luxembourg Conference. In 1998, the Commission set up a High-level Group on Tourism and Employment. On the basis of its recommendations⁷, which were widely approved, the Commission submitted a Communication on *Enhancing tourism's potential for employment*⁸. This received strong support from the Parliament, the Economic and Social Committee and the Committee of the Regions and gave rise to the conclusions of the Council of 21 June 1999, which called upon the Commission and the Member States to co-operate closely in order to maximise the contribution which tourism may make to growth and employment, particularly with respect to four subjects (*information, training, quality and sustainability*) and resulted in the creation of working groups (see Annex 1).

The main results and recommendations of each of the working groups are summarised in Annex 2. They agreed on a number of common messages, in particular:

- the fundamental role of information, knowledge and its dissemination,
- the need for competent human resources motivated by medium and long-term prospects,
- the integration of environmental policy and the promotion of sustainable tourism,
- recognition of the need for European harmonisation of the concept of quality of tourism services and infrastructures, and its assessment and monitoring,
- the need to speed up the integration of information society tools and services in all tourism activities and businesses, in particular SMEs,

⁴ Luxembourg Conference, Employment and Tourism: guidelines for action, 4-5.11.1997.

⁵ Luxembourg European Council, 21-22.11.1997.

⁶ Conclusions of the Council (Tourism) of 26.11.1997.

⁷ European Tourism - New partnerships for employment: Conclusions and recommendations of the High Level Group on Tourism and Employment, European Commission, October 1998.

⁸ Communication from the Commission to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions - *Enhancing tourism's potential for employment*, COM(1999) 205 final, JO C 178-03 of 23.6.1999.

- the need for a network of the stakeholders involved and a generalised partnership, particularly between those in the field to ensure implementation of all the recommendations.

2. Other important questions for European tourism

As described above, since the conclusions of the Council of June 1999 a period of increased co-operation has begun and important new questions have emerged.

This working method has been supplemented by ministerial conferences in Vilamoura (P), Lille (F) and Bruges (B), each held by the Member State holding the presidency of the European Union and open to all the stakeholders involved in European tourism. The conferences are gradually opening up to the representatives of candidate countries. They usually result in a presidency document which is submitted at a session of the Internal Market/Consumers/Tourism Council⁹ and have given steady support and encouragement to the co-operation process.

First, attention should be paid to the discussions held at the ministerial conferences and the priorities which emerged. At Vilamoura, on 11 May 2000, an improvement was called for in the co-ordination of national policies and political recognition of the role of tourism.

In Lille on 22 November 2000, the Presidency advocated consolidating the work of the Tourism Advisory Committee and proposed a set of 15 points which could be the subject of greater consultation. Concern focused on setting up a network of pilot regions, sustainable tourism, the exchange of information, improved knowledge of the tourism sector and training.

On 2 July 2001 in Bruges, the Presidency, wishing to ensure "tourism for all", summarised the need to make tourist activities accessible to certain target groups, in particular young people, old people, those living on the threshold of poverty, the unemployed and disabled people. As regards the latter, the desire was expressed for indications of accessibility to facilities and services to be simplified and harmonised. This resulted in the Conclusions of the Presidency on "Tourism for all", which were ratified at the meeting of the Council on 27 September 2001.

Following more detailed discussions with tourism associations and civil society organisations, their representatives were included in the working groups and their concerns broadly integrated in the final recommendations. On this occasion the associations highlighted the need for management and promotion of the image of Europe for the purposes of tourism, in particular to offset the negative effects of events related to public safety, even before the attacks in the United States. They also stressed sustainability and workers' interests.

Other important questions concern Community policies such as: transport (sustainable mobility, passenger rights and safety and transport quality), competition (concentration of businesses, vertical integration and state aid), internal market (freedom to provide tourist services) equal opportunities, consumer protection (tourists in a highly transnational market), regional policy and structural instruments to assist tourism, trade and international relations (GATS) and enlargement.

⁹ Briefing by the Presidency, Council of the European Union, 24.11.2000, doc. 13832/00; Presidency report on the Bruges Conference, Council of the European Union, dd. 18.9.2001, doc. 11897/01; Conclusions of the Presidency, Council of the European Union, dd. 18.9.2001, doc. 11894/01.

For example, the strategy adopted for the internal market in services aims to suppress national barriers to free movement of services within the EU in order to make providing cross-border services as easy providing services within a Member State. This strategy also covers tourism. It has two phases. The first is the identification of existing obstacles; the second will consist of proposing appropriate solutions in the light of the results obtained. Furthermore, the White Paper on "European transport policy for 2010: time to decide"¹⁰ outlines how to achieve tourist transport that is more efficient, sustainable and of higher quality. The analysis of the civil aviation sector presented in this White Paper has been updated to reflect the situation after the attacks on 11 September 2001 in the United States¹¹.

For all the stakeholders, including the Commission, a better basic knowledge is essential for the success of most of the measures proposed. This requires, for instance, improved statistics. The volume and quality of the data currently available are insufficient. Furthermore, given the complexity of the tourism industry, a detailed analysis of the sector is being carried out in order to have the necessary knowledge for targeting future action.

In the short term, certain planned events deserve consideration: 2002 as International Year of Ecotourism, the World Summit on Sustainable Development of September 2002 in Johannesburg, and 2003 as European Year of People with Disabilities.

IV. STRATEGIC APPROACH AND PROPOSALS FOR ACTION

A. Strategic approach

The objective of the "Tourism and Employment" process is to create the conditions and provide the basis for sustainable, high-quality tourism and competitive European tourism businesses. The strategy for achieving this is based on a number of points, the main ones being:

- to follow a knowledge-driven approach, to know how to better exploit existing information, to acquire and develop know-how, to innovate by developing new processes and to benefit from best practices. This also requires better understanding of the organisation of the stakeholders, their interrelation and their interdependence;
- to promote the adaptation of the sector and its businesses to market developments: such adaptation requires the development of tourism supply, the quality of products, the availability of competent human resources and the management methods of up-to-date businesses, with particular emphasis on the needs of SMEs;
- to make use of all the policies and instruments at various levels which can have an effect on tourism: this means monitoring, assessing and managing their effects on tourism and helping incorporate tourism issues in the various policies concerned;
- to implement a limited number of measures, provisions and tools which respond to the priority areas;
- to define, with all stakeholders, the targets to be achieved, timetables and costs for the above measures;

¹⁰ COM(2001) 370 of 12.9.2001.

¹¹ COM(2001) 574 of 10.10.2001.

- to speed up the transition of all bodies, authorities and businesses in the tourism sector to the information society and promote the use of tools and services based on ICT, including their incorporation in a network.

The measures must meet the following criteria:

- be in line with the process of convergence of Member States' policies via the open co-ordination method, involving all the stakeholders, through a co-operation approach;
- be based as far as possible on existing measures and structures, and improve and develop them making them more appropriate for the action to be taken, rather than creating new ones;
- strictly observe the principle of subsidiarity, which will determine the distribution of responsibilities amongst the various stakeholders;
- involve full partnership between public and private stakeholders and the various levels and interests of political, administrative, professional and social origin concerned, in order that all identify with the process and with the measures proposed and granted;
- receive added value through integration in a co-operation structure promoting the implementation of action at Community level.

B. Proposed actions

a) A new impetus for a consistent, integrated approach

1. Incorporation of tourism in Community policies and measures

Many Community policies and measures involve tourism stakeholders and directly influence their activities. Since 1992, the need has been felt for all these measures to be evaluated and monitored. The contributions and discussions of the working parties have confirmed the major importance and impact of measures affecting tourism under many Community policies. Given that these measures are mostly governed by the principle of subsidiarity, the Commission and the Member States should co-ordinate with each other.

The first measure proposed aims to increase contact with those responsible for these Community policies and initiatives. It will prepare for and strengthen measures 2 and 3 below.

Measure 1: Introduction by the Commission, in co-operation and co-ordination with the Member States and the tourism industry, of mechanisms to improve the integration of the concerns of all tourism stakeholders in Community policies and initiatives affecting the sector.

These mechanisms primarily concern two fields, namely a more systematic assessment of the effects of Community measures on tourism and fully taking account of the sector's interests and needs when measures are drawn up and implemented. In the short term priority will be given to the drafting of the Sixth Framework Programme and the subject of "information society technologies".

2. Consolidation of the new co-operation approach between tourism stakeholders through the open co-ordination method.

Council Decision of 22 December 1986 gave the Tourism Advisory Committee the task of facilitating exchanges of information, consultation and, where appropriate, co-operation. Recent discussions, in particular those held during ministerial conferences, highlighted the need to pursue and consolidate the work undertaken by the Advisory Committee.

Measure 2: Strengthen the role of the Advisory Committee on Tourism.

At the Commission's initiative or at the request of the Member States, this Committee will be able to discuss any matter which may be of interest to Member States, related to issues affecting tourism. In addition to the participation of representatives of the Commission services concerned, this discussion could benefit from the opinions and expertise of those from the industry and other parties involved.

The 1999 Communication had already mentioned that the system for consulting European tourism organisations should be reviewed. The new system of dialogue with the industry and representatives of civil society set up under the "tourism and employment" process has proved its effectiveness. Involvement of all the stakeholders very early in the definition and discussion stages of proposals linked to tourism contributes to improving proposals, speeding up their application and facilitating the monitoring of progress.

Measure 3: Promote a better interface with the tourism industry and other groups of stakeholders.

This should involve holding an annual European Tourism Forum. The structure and content of the Forum would be based on proposals and preparatory work, allowing the industry to raise and discuss the areas of greatest concern. The Forum would bring together high-level figures from the industry, civil society and the European, national and regional authorities responsible for tourism. Discussions would focus on one or two subjects of priority for the industry.

The Commission could launch this measure by organising the first Forum in close co-operation with the other stakeholders. Afterwards they should be organised by the European tourism industry, in co-operation with the Community institutions and the Member States. The success of this Forum will depend on strong, lasting commitment on the part of the industry.

3. Increase interaction with destinations and their representatives

The destination is the main focus of tourism activity and shapes the image of tourism. It is the place of interaction between public and private stakeholders and where almost all the SMEs in the tourism industry are gathered. In one way or another, all the working parties identified the need for promoting links between destinations through partnership networks, particularly where there is a cross-border and/or interregional element. This increased interaction corresponds to many of the elements and criteria for a strategic approach described above. Furthermore, some of the measures proposed in the rest of this document will be able to

succeed and have a significant impact only with the active participation of destinations and their stakeholders.

The exchange of information, good practice and pilot experiments, the search for common solutions, the support or integration of the stakeholders and the networking of tourist destinations are at the centre of the needs identified. They contribute to improving the management and promotion of destinations, enhancing the tourism potential and ensuring reasonable exploitation of heritage, promoting the development of local tourism which generates jobs, and creating competitive businesses. It is also in this context that support for SMEs, security and the quality and accessibility of services for everybody could be improved.

Some partnerships of limited geographical coverage already exist, often following a project carried out with Community financing. Overall coherence of these activities is rarely envisaged even though it is necessary for the emergence of partnerships. The attention of destinations and those concerned on the ground should be drawn to these possibilities and an approach developed.

Measure 4: Increase interaction between the other stakeholders and destinations and promote partnerships between the various players (destinations/regions; economic and social stakeholders in private and public spheres and associations).

By creating a network, this measure will make it possible to co-operate at European level to promote sustainable, high-quality tourism and competitive businesses. In this way it will help strengthen the image of Europe as a tourist destination. The role of the Commission will be limited to providing the initial stimulation necessary for creating networks and partnerships. This will be done in close co-operation with the Member States and will include the recognition of the breakdown of responsibilities between public and private *stakeholders* and associations.

Non- financial assistance from the Commission, national and regional authorities and private *stakeholders* and associations could facilitate initiatives by players concerned. However, financing should be covered principally by contributions by the participants/beneficiaries of the network/partnership. Financial instruments available under the various Community policies concerned could be used for specific initial stimulation measures or in response to European political priorities.

The implementation of measures 1 to 4 will help consolidate the new policy based on the open co-ordination method as set out in the White Paper on European Governance. Its success depends on the firm commitment and active participation of those in a position of responsibility.

b) *Availability of the necessary knowledge and tools for all stakeholders*

4. Mobilise existing competence and support centres for the development of knowledge and observation regarding tourism

Specialised bodies or centres for the tourism industry exist at national and/or regional level in most Member States. They provide the infrastructure and basic support necessary for the different stakeholders involved in tourism, in particular destinations, to meet their needs and assess developments in the sector. It appears that the existing Community structures and

instruments are adequate to provide the support necessary for implementing the working group's recommendations¹².

The creation of a network of functions and services useful for tourism stakeholders will provide significant added value at Community level. It is necessary for the success of the various measures envisaged, which include:

- generalised, easier access for local and regional centres to all the information available in Europe on tourism and direct access to the best European experts on each subject;
- the possibility of generating special attention for subjects of Community or European importance, simplified co-ordination for increasing the knowledge necessary for public and private stakeholders to act in a way which will promote sustainable, high-quality, competitive tourism.

Measure 5: Networking services and support functions which are necessary for one or more of these measures and the resulting activity (e.g. activities resulting from measures 7 to 10). Their accessibility to stakeholders will be ensured by competence centres (observatories, study and research centres or other bodies of this type) at national, regional and local levels.

The approach will be based on the open, voluntary participation of the centres. First, the Member States will be asked to give details of the centres with the required competence. Where appropriate, the Commission could give the names of supra-national or international centres qualified in this area. The correct approach for creating the network will be discussed at the Advisory Committee with the contribution of those involved in measure 4.

In general, the creation of the network will take place without any additional costs. If necessary, additional resources could be found mainly at national, regional and local levels from public and/or private stakeholders. The Commission could facilitate and encourage the measure by providing non-financial assistance. Where appropriate, on the initiative of those directly involved, the measure could receive financial support under the various Community policies concerned.

A pilot/co-ordination body for the services on the network involving the stakeholders concerned and comprising representatives of specific functions will be set up. It should remain under the responsibility of the authorities currently in charge of the centres.

5. Promoting stakeholder access to Community instruments

The objective is to make good use of Community instruments - whether or not financial - for the benefit of the tourism industry. This will require keeping stakeholders better informed about these instruments, particularly by periodically updating the Internet guide on EU

¹² The recent proposals submitted in response to the call for proposals for ERDF innovative measures (2001-2006) include, in the majority of cases, the development or use of competence and support centres at regional or local levels. Training needs, the creation of networks, support for SMEs and the monitoring of innovation form the basis of the work of these centres, with, in many cases, a special focus on tourism.

schemes to support tourism, learning from the past and improving the fixing of priorities for programmes and measures in the future¹³. In this context, existing support networks financed by the Commission (Euro Info Centres and Innovation Centres) should provide an important contribution¹⁴.

It is up to the Member States and the regional authorities, in co-ordination with the tourism industry at all levels, to make proper use of such instruments. Of the Community instruments, the Structural Funds and the R&D framework programme are particularly important, given both their financial weight and the fact that they allow the performance of concrete projects in a wide range of fields.

Measure 6: The Member States, the regional authorities and the tourism industry will introduce measures and schemes for the good use of Community financial and non-financial instruments to the benefit of the tourism industry.

The stakeholders particularly concerned, including the tourism authorities, should benefit from the work and partnership of the Commission by closely monitoring the implementation of Community instruments in the field and their use for the benefit of the tourism industry. For instance, the Member States could create working parties or hold workshops to facilitate the access of the tourism industry to these instruments (e.g. structural funds, research framework programme) and promote dialogue with the regions and the other stakeholders involved in tourism projects. This should also enable all the players, including the Commission, to draw conclusions enabling them to draw up more appropriate priorities and provisions in the future. This measure and the exchange and assessment of experiences will help increase the co-operation provided for in measures 1 to 4, from which this measure will also benefit.

c) Create the tools necessary for implementing specific, technical measures

The activities resulting from the first four measures will be based, primarily, on the network set up under measure 5. The network will make use of sufficiently harmonised methods and tools which are well-known and available, directly or in the form of services, to all the stakeholders concerned. Initially this concerns the assessment methods, manuals and guides, statistics and, more generally, tools for improving knowledge. This is an open list which will develop according to the progress achieved in ongoing activities and the new needs identified by the various stakeholders. It will be updated regularly.

6. Satellite accounts for tourism and statistics

Statistical information as it exists in Europe is insufficient from both the qualitative and the quantitative points of view for the purposes of all those involved in tourism. The statistics do not fully reflect the impact and economic importance of tourism as an economic sector.

The World Tourism Organisation (WTO), the Organisation for Economic Co-operation and Development (OECD) and Eurostat have jointly created a new series of indicators, Tourism Satellite Accounts (TSA), which should improve the appraisal of tourism activities at national level and the importance of tourism in the overall economy. Following its latest studies,

¹³ http://europa.eu.int/comm/enterprise/services/tourism/tourism-publications/documents/roadmap_en.pdf.

¹⁴ <http://europa.eu.int/comm/enterprise/networks/index.htm>.

Eurostat is planning to present a technical manual for the implementation of the TSA at the beginning of 2002.

Measure 7: In co-ordination with the public and private stakeholders concerned and with their support, the Commission and the Member States will take the necessary steps to introduce Tourism Satellite Accounts (TSAs).

The Member States and the Commission must define the implementing procedures and the responsibilities of the various stakeholders concerned, including the tourism industry, and draw up a realistic timetable. A financing plan, to be divided between the Member States, the Commission and those working in the tourism industry, should be drawn up. In an initial stage (2002-2003) the Commission will propose financial support to examine feasibility and to create TSAs in the countries which wish to get involved, under the multi-annual programme for enterprise and entrepreneurship (2001-2005) ¹⁵.

Council Directive 95/57/EC laid down the statistical information to be collected in the field of tourism ¹⁶. Its implementation is governed by Decision 99/35/EC ¹⁷. To ensure the availability of better statistical information in the future, it would be desirable to examine the need for changes in the legal base for tourism statistics. The presentation of the statistical information should also be adapted to the specific needs of stakeholders in order to make it more directly usable.

7. A European Agenda 21 for tourism

Several attempts have been made at international, regional and local levels to adapt the principle of sustainable development to the specific characteristics of the tourism industry. There is growing demand at European level for the identification of strategic guidelines and the measures necessary to achieve a sustainable development model for tourism. The implementation of sustainable development principles in destinations and the various sub-sectors of tourism activity is also perceived as added value for the image of the destinations. This requires a sustainable development strategy for tourism in Europe, in the form of a comprehensive action programme: this instrument is generally known as Agenda 21.

¹⁵ OJ L 333 of 29.12.2000, p. 84.

¹⁶ Directive 95/57/EC of 23.11.1995 on the collection of statistical information in the field of tourism, OJ L 291 of 6.12.1995, p. 32

¹⁷ Decision 99/35/EC of 9 December 1998 on the procedures for implementing Council Directive 95/57/EC, OJ L 9 of 15.1.1999, p. 23

Measure 8: Promote sustainable development of tourism activities in Europe by defining and implementing an Agenda 21.

This Agenda will concern several, particularly important, aspects such as: the protection of natural resources, the incorporation of environmental and poverty problems in tourism policy, improving the participation of all the stakeholders and the monitoring of implementation, and the social responsibility of businesses. It should be in line with the overall approach to sustainable development defined for the EU.

The Commission will start drafting the document on the basis of the results of the Sustainability Working Party in order to speed up the development of Agenda 21 in Europe. A steering group will manage the work, under the chairmanship of the Commission, with representatives of the Member States along with representatives of other tourism stakeholders, including environmental NGOs. The document should be available as a contribution at the World Summit on Sustainable Development in September 2002 in Johannesburg.

8. Guidance documents

The concerted definition of orientation, which results from a common effort, contributes to improving the quality and competitiveness of the European tourism sector. Guidance documents should be produced as needs emerge. Initially two specific needs have been identified.

Broad consensus emerged during discussions and seminars on the need for better signposting, harmonised at European level, to meet the need of disabled tourists for information on the accessibility of tourist sites and facilities. At the moment different systems coexist, which makes it difficult to interpret the quality of the services actually on offer.

The working parties also identified the need to move on from simple training to a global solution, so that the tourism industry can possess all the skills necessary for innovation. The solution is an approach called "Learning Areas", which is to offer both a general framework defining the necessary skills and allow their implementation in a specific geographical area (destination). A manual on this subject will provide general guidance, identifying the basic components for a Learning Area. It will take into account the emergence of an innovative environment, provide advice, seek appropriate solutions and provide the necessary support and training for implementation. It will be made available to local and regional competence centres to help them innovate in their own Learning Areas.

Measure 9: Depending on how needs develop, European, national, regional and local authorities promote and support the production of guidance documents on general subjects of social and economic interest. They will ensure technical co-operation for this purpose. Initially two manuals will be drawn up. One will contribute to harmonising the accessibility criteria of sites for disabled people and the other the definition of Learning Areas for tourism.

The Commission intends, after consulting the representative organisations of the tourism industry and disabled people, to start work on drawing up harmonised criteria for the accessibility of tourist sites and facilities to disabled tourists. They should result in the simplification of the relevant signposting and should be used to raise the awareness of stakeholders, particularly in the context of the European Year of People with Disabilities, 2003.

The production of other guidance documents should be based on increased co-operation as provided for in measures 1 to 4. In this spirit, the European Centre for the Development of Vocational Training could be an important partner in drawing up a manual on Learning Areas for tourism.

The Commission will further promote the dissemination and application of good practice in sustainable tourism along the lines of the document on "Sustainable Tourism and Natura 2000: Guidelines, Initiatives and Good Practice in Europe". The follow-up of the recommendation on integrated management of coastal zones will provide an important basis for such good practice.

9. Assessment methods and tools: indicators and benchmarking

Greater knowledge is needed to improve understanding of the structures and functioning of the tourism industry and to deal with its major problems. For example the staggering of holidays, a subject which has been raised many times, has a direct effect on the labour market and training, the quality of services, the competitiveness of businesses and sustainable development. The use of new technologies, for instance, could contribute to improving the use of tourist facilities and thus reduce the negative effects of the concentration of tourism. Indicators and benchmarking methods must be made available and used for monitoring the various features of the sector. The same features are found when other important subjects for tourism are broached.

Measure 10: Draw up and disseminate the assessment methods and tools (quality indicators and benchmarking) necessary for monitoring the quality of tourist destinations and services.

Activity should concentrate on the methods and tools which could be adopted by destinations and tourism service businesses for their own use. First of all, the existing methods and tools should be assessed and if necessary adapted. Studies could also be carried out to analyse and determine the subjects and requirements not yet covered. This work would be based on the findings presented by the working groups and the relevant networks and knowledge gathered under measure 5, namely co-operation with European competence centres. The results will be disseminated with the support of co-operation resulting from measure 4.

Apart from the contribution of the tourism industry and destinations, the work necessary for carrying out this measure should benefit on a case-by-case basis from national and/or Community financial assistance.

10. Enlargement and international aspects

The strategies applicable to tourism policies and activities in the European Union and the related measures are equally applicable to the countries of the European Economic Area and the countries applying for membership. These countries could be involved in the work.

All the above measures should incorporate the phenomenon of increasing globalisation which also exists in the field of tourism and promote European tourism at international level. In order to pool efforts, the Commission will promote a process of consultation with other international bodies and closer co-operation with organisations such as the World Tourism Organisation (WTO) and the Organisation for Economic Co-operation and Development (OECD). The Member States, the tourism industry and the sectors of civil society concerned are requested to do the same in their areas of competence and responsibility.

The Commission will ensure respect of the interests of the tourism industry in negotiations on the deregulation of services (GATS), taking into account the links with sustainable development, in the context of the World Trade Organisation (WTO). Co-operation with Mediterranean countries and developing countries will also be taken into account in forthcoming work.

V. CONCLUSION

The Commission and the Member States have co-operated closely on all the subjects covered by this Communication. Co-operation has been through working groups created under the aegis of the Commission, with the guidance of the Tourism Advisory Committee, to follow up the conclusions of the Council of 21 June 1999. The trade associations and civil society organisations concerned with tourism have also been directly involved.

Taking into account the conclusions and recommendations drawn up by these working parties and other important questions for European tourism, the Commission has presented above an operational framework for monitoring tourism policies and activities in the European Union. It is linked to a series of measures to be put in place by the various stakeholders concerned.

They will increase the basic knowledge of the tourism sector, promote business competitiveness and foster the sustainable development of tourism in the European Union and its contribution to job creation.

The Commission calls upon the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions to examine the document submitted to them. It hopes that these proposals will be useful in consolidating, with the proactive commitment of those responsible for tourism activity in the EU, the new impetus for co-operation generated since 1999. Continuing the open co-ordination method it wishes to begin the gradual implementation of the measures proposed before the end of the first half of 2002. This will be done in co-operation with the Council and the other Community institutions and with the active participation of the tourism industry and civil society.

Annex 1:

Working groups

At the beginning of 2000, working groups, each with a precise remit, were set up by the Commission and the Member States through the Tourism Advisory Committee¹⁸. They consisted of experts appointed by the Member States according to their field of competence and representatives of the Commission departments relevant to the subject in question. For each of the working groups, one Member State volunteered to provide a rapporteur¹⁹.

Following three meetings of each working party between the end of February and the end of August 2000 and on the basis of an interim report drawn up by each rapporteur, on 7 November 2000 the Commission submitted a progress report on the follow-up to the Council conclusions of 21 June 1999²⁰.

The discussions on the approach of the progress report, which began at the Vilamoura Conference, continued at an inter-ministerial meeting in Lille. The results of the discussions, which advocated continuing and consolidating the work undertaken, were submitted by the French Presidency to the Internal Market/Consumers/Tourism Council of 30 November 2000.

The discussions led to two important developments:

- the working groups were opened up to representatives of tourism trade associations and civil society organisations affected by tourism²¹.
- a fifth working group was set up to examine the *"impact and use of services based on information and communication technologies in the tourism sector"*²².

The cross-cutting nature of the subjects had revealed the importance of ensuring co-ordination and an exchange of information between the working groups. Two meetings organised by the Commission in 2001 gave the rapporteurs and the Commission co-ordinators the opportunity to exchange information, to agree on the best way of approaching the fields to be covered and to reuse the existing results, whilst preventing overlap between groups.

In the first half of 2001, each working group held three meetings, apart from the fifth working group which, because it had been set up late, held four. They discussed the guidelines and definition of priority measures for each subject. The fact that all the stakeholders in European tourism were allowed to participate made it possible, very early in the process of defining guidelines and measures for the future of European tourism, to ascertain the opinions of all those involved.

¹⁸ Council Decision 86/664/EEC of 22 December 1986 establishing a consultation and co-operation procedure in the field of tourism OJ L 384 of 31.12.1986, p. 52.

¹⁹ Working Party on Information: Portugal (2000), then Italy (2001).

Working Party on Training: Denmark.

Working Party on Quality: Spain.

Working Party on Sustainability: France.

²⁰ Commission Report to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions "Progress report on the follow-up to the conclusions of the Council on Tourism and Employment", COM(2000) 696 final.

²¹ Unions, regional authority associations, tourist associations, environmental non-governmental organisations.

²² Portugal provided the rapporteur.

The final reports of the working groups were drawn up by the rapporteurs on the basis of the contributions of the other members of the working groups and the various discussions. The reports were forwarded to the Member States and to the tourism trade associations and civil society organisations concerned in the middle of July 2001. The meeting of the Tourism Advisory Committee held on 5 September 2001 which these associations were invited to attend, gave them the opportunity to present their comments on the results of the working groups and the guidelines and measures proposed.

As regards the socio-economic stakeholders identified in the progress report of 7 November 2000, only the discussion with the local and regional authorities did not reveal sufficient progress. The Commission considers the opening of these discussions a priority at the current stage of submitting recommendations. Many proposed measures cannot be effective if they do not receive the support of local and regional authorities in their implementation.

Annex 2:

Main results and recommendations of the five working parties²³

Working Group A - To facilitate the exchange and dissemination of information, particularly through new technologies

On the basis of a comprehensive list of **potential stakeholders**, an **information typology**, and an analysis of the **needs** of the various players, the working group identified the most urgent need to be to gather the following information: volume trends regarding tourism demand, characteristics of national and foreign visitors (incoming/outgoing), the economic role of tourism, the structure and features of tourism activities by sector, a list of primary resources and their characteristics, and a list of the legislation and regulations regarding tourism.

Most **existing sources and information tools** cover both supply and demand, the economic role and its repercussions, human resources, legislative and financing bodies, databases and documentation. The form each subject takes varies a lot from one Member State to another. Moreover, as regards national sampling, the Member States do not have a common standard regarding quality for accurate research methods. The data cannot, therefore, be summarised or correlated to produce a plausible trend within the European Union over a period of several years. Furthermore, the implementation and observance of Council Directive 95/57/EC on the collection of statistical information in the field of tourism are still considered inadequate.

The **policies and measures regarding the dissemination of information** on subjects related to tourism were grouped together into **eight categories**: methodological documents; documents presenting tourist statistics and the socio-economic results of tourism; oral contributions; CD-ROM; Internet and discussion fora; databases; platforms for the promotion of tourism and destination management systems; platforms for the marketing of tourism products.

In each of the categories, the most obvious **gaps** regarding sources and tools were highlighted, giving rise to **the following five recommendations**:

1. to improve the assessment of the economic role and influence of tourism
2. to improve the dissemination of information between the various parties;
3. to improve information on destinations in Europe;
4. to improve the analysis of tourism demand, market research and the analysis of original markets;
5. to gather information on the labour market and training available (Working Group B).

²³ The ideas expressed are those of the experts participating in the Working Groups, and may not be regarded as stating an official position of the Commission. The complete text of the reports of the five Working Groups is available on <http://europa.eu.int/comm/enterprise/services/tourism/index.htm>.

These recommendations led to the following **three priority measures**, which should be carried out in the short/medium term:

- to improve and increase the accessibility of information and its dissemination, particularly for SMEs, through a combination of new technologies and traditional tools;
- to facilitate and support the creation of partnerships between the various parties in the destinations/regions for the exchange of information and good practice;
- to support and promote the use of tourism satellite accounts (TSAs).

Working Group B - To improve training in order to upgrade skills in the tourism industry

The main training needs show that tourism is still characterised by a workforce with a relatively low level of skills for the majority of jobs in the basic sub-sectors, particularly regarding SMEs. On the other hand, there exists a new demand for additional skills, for example in ICTs. The principle obstacles encountered in upgrading skills are: lack of labour force and high level of staff turnover; the low image and particular working conditions of the tourism industry as a place to work, including seasonality; lack of basic qualifications that could be upgraded; reduced competitiveness in small enterprises owing to the lack of training in new skills. The main **stakeholders** in the larger businesses have taken steps to ensure they have a qualified staff.

Strategies and measures designed to upgrade skills in the tourism industry show a trend towards more holistic solutions based on partnerships and dialogue between training institutions, the tourism industry and other major stakeholders, such as public authorities. They go beyond training, clearly combining teaching and practical experience. The direct correlation between learning, employment and labour environment makes it necessary to take into account the economic and social dimensions when trying to upgrade skills. This can be developed towards a common philosophy on learning, the approach of so-called **Learning Areas**, which involve all tourism and training stakeholders in the learning and innovation process through active practical co-operation and networking.

The existing contribution and potential of Community policies and programmes mainly relate to training and education (LEONARDO DA VINCI, SOCRATES, TEMPUS), employment (EQUAL), and educational organisation networking (ALFA). The Structural Funds could be better used to implement innovative solutions.

The conclusions of the Working Group were formulated with regard to three priority areas: attracting skilled labour to the sector; retaining and developing skilled labour in the sector; and supporting micro-enterprises at regional and local level to improve competitiveness. Apart from the recommendation to promote the introduction of the EUROPASS Training document for tourism²⁴, two measures were developed in greater detail, with a view to implementation:

- *A Permanent Observatory on learning, employment and the labour environment in the tourism sector*: gathering, monitoring, generating and providing updated information and fostering debate on related key issues in order to improve knowledge (qualitative and quantitative), with the main objective of providing strategic information to ensure sustainable competitiveness in tourism;
- A "*Handbook for learning areas in the tourism industry*": a practical guide for action to transform learning into innovation, taking into account the "fragile" reality regarding human resources (economic and social dimension), considering a method (mixture of strategic information, learning and advice/guidance) of learning which is more complex than conventional training, and using bottom-up/top-down approaches, partnerships and co-operation between all the stakeholders concerned.

Working Group C - To improve the quality of tourism products

The Working Group agreed on a definition of quality in tourism in line with that of the World Tourism Organisation, emphasising that quality is the perception by the tourist of the extent to which his expectations are met by his experience of the product. Quality is not to be equated to luxury, and must not be exclusive, but must be available to all tourists, including those with special needs. The tourist product should be seen as the destination and the process resulting in the tourist's overall experience. The key stakeholders are organisations fulfilling the roles of: policy makers, destination management and quality control; suppliers of tourist sub-products; commercial intermediaries; training suppliers; the guests, and the host population.

An in-depth analysis of the quality policies and methodologies adopted within the different Member States identified among the relevant strategies and measures: ISO 9000 and 14000 series; the EFQM methodology; star classification systems; various country specific quality systems.

The assessment of the contribution of relevant Community policies and programmes to quality in tourism revealed the following policy areas as particularly relevant to quality development: structural policies; consumer protection; environmental policies; transport and enterprise policies. Of these, the Structural Funds offered the most potential to directly influence quality improvement in tourism.

²⁴ The implementation of the Commission initiative on adopting a EUROPASS-Training document (Council Decision 99/51/EC of 21 December 1998, OJ L 17 of 22.1.1999, p. 45) has already been mentioned in the Communication on Enhancing tourism's potential for employment, as a tool which can promote mobility through work-linked training, including apprenticeships, and allow greater transparency and visibility in the qualifications and experience acquired during work-linked training abroad.

The Working Group identified four priority areas requiring specific efforts in the European Community context, with the following conclusions and recommendations:

- **Indicators for the measurement of the quality improvement process:** Quality improvement is a cyclical and continuing process, and as such must be able to be measured and evaluated. The group drew up a framework together with a draft list of possible indicators for use by different managers. This could be considered during the development of support tools.
- **Benchmarking at the European level:** Benchmarking of destinations will help to ensure quality improvement and could benefit from common quality indicators. It should be a voluntary exercise, led by the destinations, supported by information-exchange procedures based on networking.
- **Non-financial support for tourism SMEs implementing quality systems:** e.g. consultancy, business advice, fora, etc. should be improved to encourage adoption of a quality approach, this in preference to direct financial aid, which risks distorting local competition.
- **More intensive use of the Structural Funds to improve the quality of tourist products:** The Structural Funds should concentrate resources on creating the framework for tourism business development, rather than supporting individual enterprises or destinations, (e.g. through training, infrastructure improvement, non-financial business support). Tourism authorities in all Member States should be integrated into the implementation of the programmes. There is a need for better dissemination of information on the operation of Structural Fund programmes throughout the tourism industry.

Working Group D - To promote environmental protection and sustainable development in tourism

Bearing in mind the economic, social and environmental considerations, Working Group D drew up the following definition of sustainable tourism, based on that of the World Tourism Organisation: "*Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems.*"

The active participation of all the **stakeholders**, in their respective fields; in the implementation of sustainable tourism is essential. This applies particularly to destination managers, travel agents and tourists themselves. The experts have identified **strategies and measures to promote the sustainable development of tourism**, such as Agenda 21 for the Mediterranean and the Baltic Sea, Destination 21 in Denmark and the local Agenda 21 of Calvià (Balearic Islands, Spain).

More and more measures regarding sustainability are being adopted under the various Community policies and programmes. They include, for instance, the European strategy for sustainable development, the Sixth Environmental Action Plan, the Cardiff integration process and other sectoral strategies, such as those for energy and transport. Although its crucial importance has been recognised, particularly the contribution it can make to a

common sustainable development strategy, the principle of obligatorily including the environment in every sectoral policy is not yet applied in the tourism industry.

The Working Group drew up its **conclusions and recommendations** on the basis of **Agenda 21 for tourism in Europe**. In this context the strategic guidelines for the sustainable development of transport related to tourism are of particular importance. The Working Group drew up a methodological approach for Agenda 21 for EU tourism, The purpose is to draw the attention of all parties to the need for common commitment to the implementation of such an approach, which, however, will remain non-binding.

The objectives are: *to prevent and reduce the territorial and environmental impact of tourism in destinations; to control the growth of transport linked to tourism; to promote responsible tourism as a factor for social and cultural development.* The co-ordination and partnership measures at all levels, the sharing of information and a voluntary approach, together with the setting up of measures to increase the competitiveness of European businesses are viewed as essential prerequisites. The experts see the Commission as having an important role in implementation. The instruments proposed are:

- *political co-operation and a body based on partnership, built around a consensual approach in order to identify and define the priority targets to achieve the principles regarding sustainable tourism;*
- *a technical body ("tourism observatory") providing know-how and expertise. It will carry out regular monitoring and produce reports based on reliable indicators.*

Working Group E - Controlling the impact and use of services based on Information and Communication Technologies in the tourism sector

In order to identify the services based on Information and Communication Technologies (ICT) with a major relevance for public and private stakeholders in tourism, the Working Group agreed on the following common definition: *"ICT based services" refers to the use of digital electronic methods and tools to gather, process, share and distribute information throughout the tourism value chain. Digital electronic methods and tools can be software applications and components, data, formal specifications, standards or devices supporting a specific set of tourism related business processes".*

Three categories of service were identified as having a major impact on the tourism sector: development of networking facilities, interoperability and systems integration, and finally a new set of applications for enterprise management and electronic commerce. The assessment of the awareness, accessibility and use of these services by the different tourism stakeholders has shown that tourism stakeholders are using ICT differently, based on main factors, such as their core competence, their size and their relative position in the tourism value chain. The level of awareness and access also differs by type of stakeholder (traditional distribution channels, accommodation services, consumers, destination management organisations, tourism administration and transport).

Strategies and supporting measures at European, national or regional level do exist. **Access to the relevant information, in particular for SMEs**, was perceived as the main bottleneck for the tourism stakeholders to benefit from them (e.g. IST programme, measures under regional policy, action under e-Europe, such as Go digital). **Three types of gap** with regard to strategies and measures have been specified. The first group refers to the need to accelerate

the legal and fiscal harmonisation at European level, in collaboration with the other relevant stakeholders, as a means towards a stable legal framework world-wide. The second group refers to the insufficient priority given to the development of content and the inadequate access to information, at all levels. The third group refers to the need for innovative approaches and solutions for SMEs to fully integrate them into the world of ICT based technologies.

The following recommendations for actions have been drawn up:

- ***Establish a European knowledge network***, based on existing European, national and regional centres. They will act as *review/knowledge centres*, close enough to the different tourism stakeholders to facilitate the access to and collection of tourism information.
- ***Set up two special interest Working Groups***. The first one, on “*mobile e-Commerce services for tourism*”, should evaluate the need for new innovative mobile services and propose measures for their development and use. The second one on “*assessing existing legislation and tax regulations*” with regard to its application in a digital tourism environment.
- ***Establish a Support Centre*** to enhance market integration for SMEs and destinations through Destination Management Systems and services for SMEs.