Ecosystem session: TOURISM

Clusters strengthening ecosystems

European Commission

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The ecosystem approach in EU industrial policy

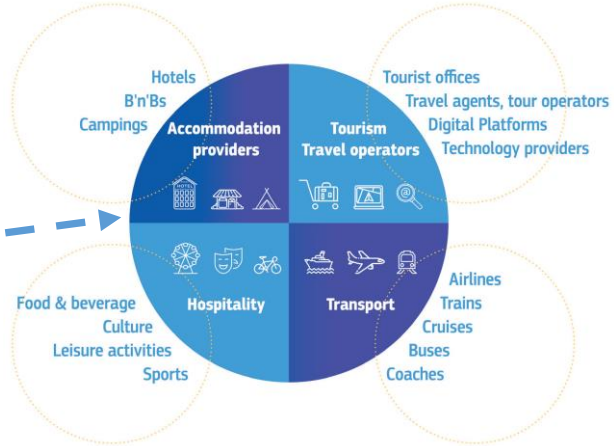
The communication "A new industrial strategy for Europe":

> *"ecosystems encompass all players operating in a value chain: from the smallest start-ups to the largest companies, from academia to research, service providers to suppliers".*

The communication "Europe's moment: Repair and Prepare for the Next Generation":

> *"The pandemic has served to reaffirm the interdependence of our economies and the importance of a fully functioning Single Market. […] Our industrial ecosystems are increasingly integrated and connected. Research, engineering, manufacturing, assembly and servicing often take place in different parts of Europe, and allow businesses to be more competitive and focus on what they do best. This will be exactly what is needed for Europe's recovery".*

Industrial Ecosystems in Europe



- Passenger transport and travel
- Hotels, short term accommodation
- Restaurants and catering
- Events, theme parks

Tourism

- Social enterprises, associations and cooperatives aiming at generating a social impact, often proximity based

Proximity & Social Economy

Creative & Cultural Industries

- Newspapers, books and periodicals
- Motion picture, video and television
- Radio and music

- Retail sales
- Wholesale connected to consumers

Retail

Aerospace & Defence

- Aircraft production
- Space manufacturing and services
- Defense products and technologies

- Building of residential and non-residential estates
- Building of roads and railways,
- Building of utilities and civil engineering
- Associated activates

Construction

Textiles

- Production of textiles, wearing apparel, footwear, leather and, jewellery

Industrial Ecosystems for the Recovery

- Telecommunications
- Software publishing, computer programming and consultancy
- Data processing, hosting, web portals
- Manufacturing of computers, communication equipment and consumer electronics

Digital

Electronics

- Raw starting materials (semiconductor wafers)
- Semiconductor manufacturing tools
- Design and manufacturing of semiconductor components

- Pharmaceuticals and other medical products
- Personal protective equipment
- Medical services, hospitals, nursing homes, residential care

Health

Mobility - Transport - Automotive

- Production of motor vehicles, ships and trains, and accessories
- Their repair and maintenance
- Transport

Agri-Food

- Plant and animal production
- Processing of food

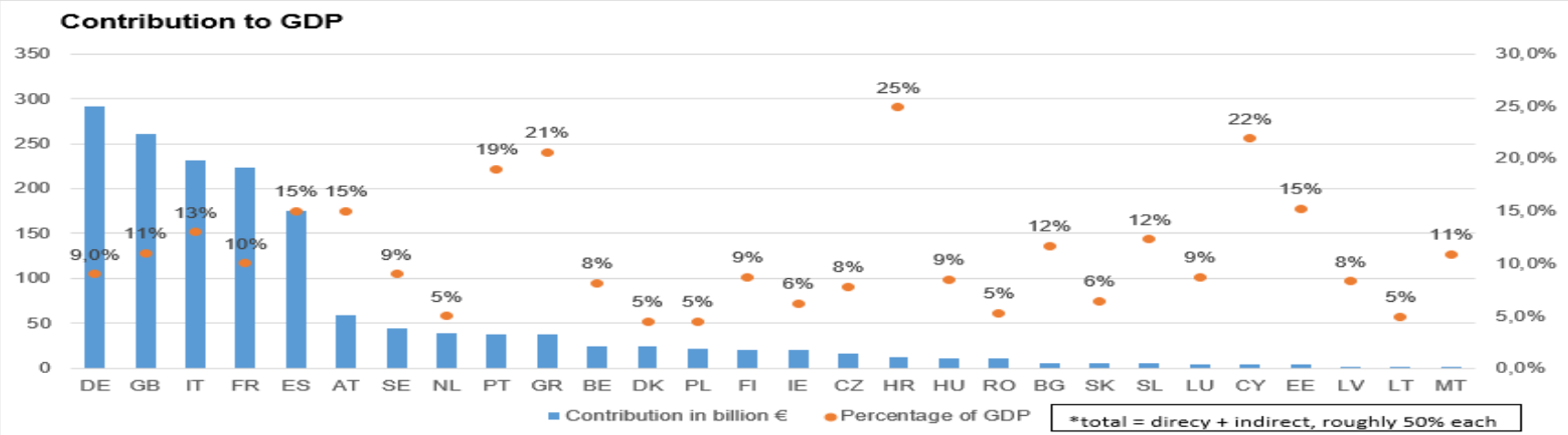
Renewable Energy

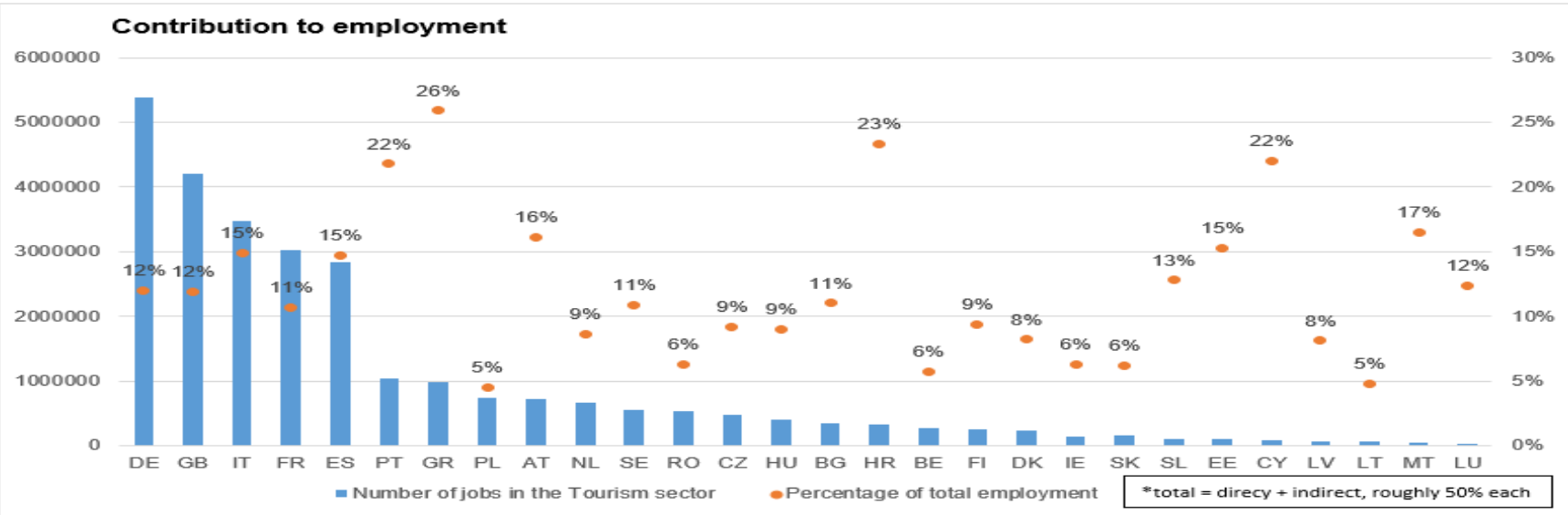
- Electric motors, engines and turbines
- Electric power generation
- Manufacturing and distribution of gas

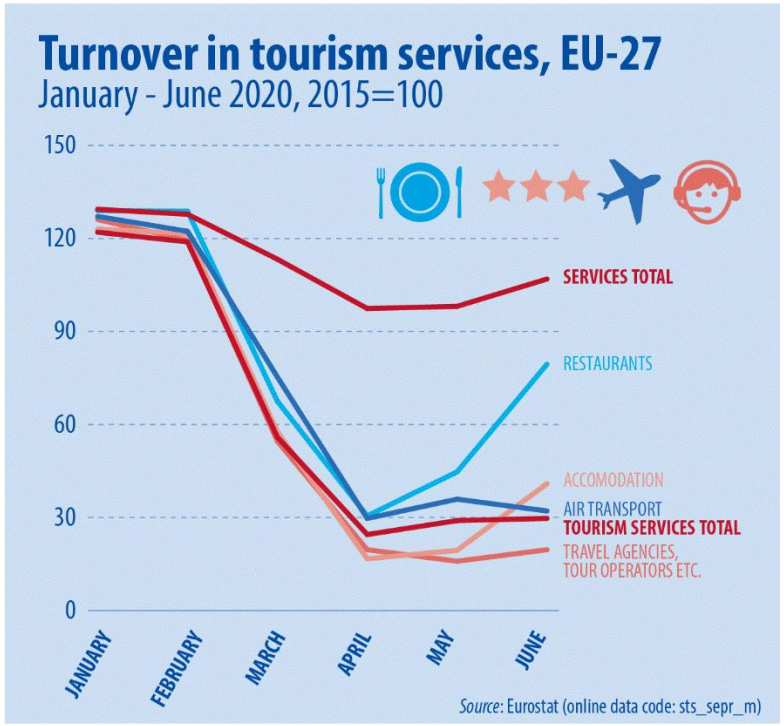
Energy-Intensive Industries

- Raw materials
- Manufacturing of products with high environmental impact: chemicals, iron and steel, forest-based products, plastics, refining, cement, rubber, non-ferrous metals, fertilisers, etc.

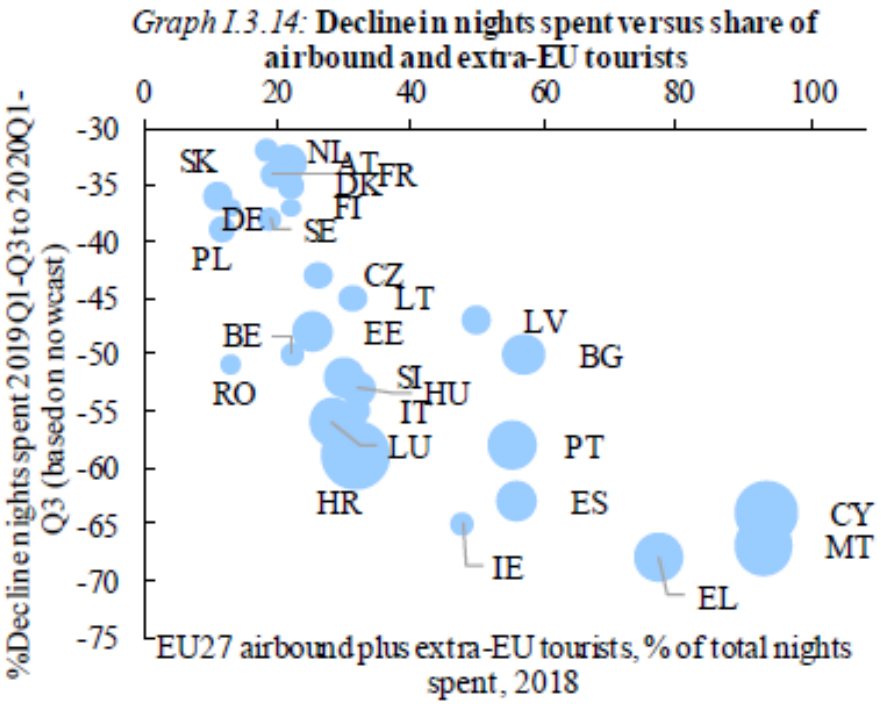
Travel and Tourism Economic Total* Impact 2019 (2018 figures)



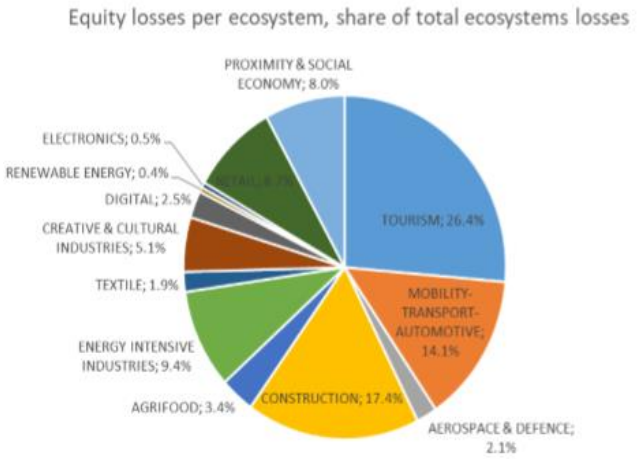




ec.europa.eu/eurostat



Source: European Economic Forecast, Autumn 2020, Institutional Paper 136, November 2020, European Commission, DG ECFIN



Basic investment needs

Tourism	161
Mobility-Transport-Automotive	64
Aerospace & Defence	4
Construction	54
Agri-food	32
Energy Intensive Industries	88
Textile	6
Creative & Cultural Industries	6
Digital	66
Renewable Energy	100
Electronics	18
Retail	115
Proximity & Social Economy	N/A
Health	32
Total	**€748bn**

Source: Identifying Europe's recovery needs, SWD (2020) 98, 27 May 2020, European Commission, p.38, 40

The road to recovery - working together

Build confidence among citizens & businesses

- coordinated approach to travel restrictions

- easy access to reliable information (Re-open EU)

- sanitary protocols for tourism businesses

- promotion campaigns ('We are Europe'/Euronews)

Restart the tourism ecosystem

- protect businesses and jobs

- Future-proofing:

- build economic resilience for businesses and regions

- green transition (tourism infrastructure, connectivity, carbon-neutral mobility, circular business models)

- digital transition (digitalisation, access to data, capacity building)

- resilient workforce (skills)

https://tourism-convention.eu/

Perceived importance of the action points proposed by the Safe and seamless tourism experience workshop

1.To develop multimodal, low-carbon transport and connectivity across EU destinations through coordinated responses to technical, institutional, and financial issues.

64 %

2.To restore traveller confidence in Europe by making sure that national governments coordinate their approach to COVID-19 risks, limiting quarantines.

62 %

3.To ensure implementation and alignment of efficient health and safety protocols across Europe.

64 %

4.To work towards the provision of strategy, policy, and coordination instruments of cross-border regulatory frameworks for developing the EU as a single tourism destination and facilitating travel.

44 %

5.Harmonisation of reliable data collection (e.g., health, travel, sustainability). Coordination of the use of data, including flows between countries.

59 %

6.To adopt data-driven approaches and up-skill and re-skill programmes to improve visitor handling, information, management and personalisation of tourism experience.

45 %

7.To ensure smart management of tourism flows/crowds for tourism development in destinations focused on quality rather than volume.

64 %

8.To establish permanent multi-stakeholder consultation mechanisms (e.g., networks, forums, hubs) for reconsidering EU tourism development (growth, markets, transport of passengers, package travel, spatial distribution, risks and crisis preparedness).

44 %

9.To enable technologies for contactless upgrade of infrastructure and processes and develop services empowering consumer choices, and facilitating assistance to visitors cross-border (e.g. multimodal ticketing and ICT solutions).

32 %

10.To strengthen cooperation across the value chain actors to establish smart-safe, innovative new services and tourism offers, building resilience and adapted to changing consumer demand.

61 %

Perceived importance of the action points proposed by the Greener holidays workshop

Perceived importance of the action points proposed by the Tourism powered by data workshop

Thank you

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