NECSTouR
European Regions for
Competitive and Sustainable Tourism

On the eve of the new European Tourism Strategy

A perspective from NECSTouR

Lapland Tourism Parliament, *2 October 2026*

NECSTouR

Network of European Regions for Sustainable and Competitive Tourism

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European Regions for Competitive and Sustainable Tourism

NECSTouR 2030 Pathway

Regenerative, data-driven and resilient tourism across European Regions

VISION

Tourism has the power to make destinations and communities flourish.

MISSION

Lead and collaborate to strengthen the positive value of tourism in European Regions.

IMPACT

Better places to live, better places to visit.

Our commitment is to benefit:

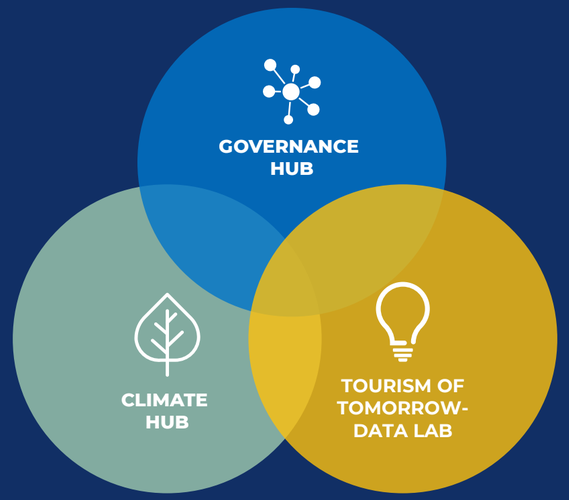
- *Business*
- *Communities*
- *Visitors*
- *Environment*

Strategic Objectives 2030

- Strengthen regional capacity for regenerative destination management.
- Support regional tourism climate action: mitigation and adaptation.
- Empower destinations to measure tourism impacts for decision-making.
- Enable regions to implement the European Tourism Agenda and Strategy.
- Double NECSTouR's network impact through collaboration and innovation.

Strategic Hubs

Empowering destination leaders to deliver sustainability



- *Projects*
- *Tools*
- *Knowledge*
- *Pilots*
- *Networking*

Empowering European destinations to flourish.

Full members



Towards a European Tourism Strategy



Importance of the tourism sector for the EU

EUR 866 billion
Gross value added 2025
7.3 % of total EU GVA

EUR 3.08 billion
Nights spent in the EU in 2025

EUR 598.6 million
Arrivals of international tourists in 2025
+ 5 % since 2024, + 8 % since 2019

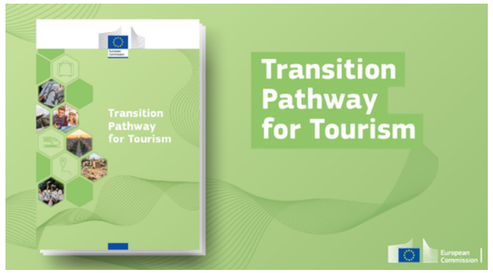
20 million
Jobs in the EU

Million
Tourism enterprises in the EU

99 %
Small and medium-sized enterprises

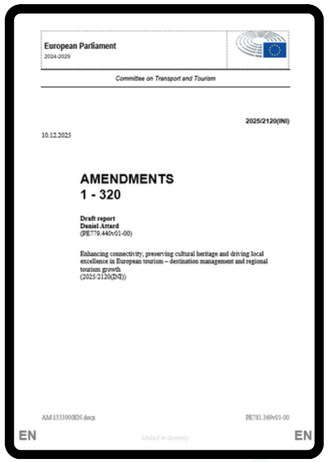
Source: EUROSTAT

NECSTouR Tourism Advocacy Group








European Parliament
2024-2029
Committee on Transport and Tourism
2025/2120(INI)
10.12.2025
AMENDMENTS
1 - 320
Draft report
Daniel Attard
(PE779.440v01-00)
Enhancing connectivity, preserving cultural heritage and driving local excellence in European tourism – destination management and regional tourism growth
(2025/2120(INI))
AM\1333900EN.docx
PE781.349v01-00
EN
EN

2023

2024

Feb 2025: TAG Kicks off

Apr 2025

Jul 2025
CoR Plenary Tourism Debate

Oct 2025
EU week Regions & Cities

Dec 2025

EP OI Tourism Report



Apóstolos Tzitzikostas
Commissioner 2024-2029
Sustainable Transport and Tourism


NECSTouR
FINAL VERSION
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.
- Reenvisioning 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 wellbeing 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 Sustainable and Smart Mobility Strategy and the EU Pact.
- 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.
Network of European Regions for a Sustainable and Competitive Tourism

NECSTouR & CoR Policy Recommendations



Better Balanced Destinations


European Committee of the Regions
NAT-VIII/006
169th plenary session, 10-11 December 2025
OPINION
Towards sustainable and resilient tourism in the European Union: Strategy for balanced and adaptive management
THE EUROPEAN COMMITTEE OF THE REGIONS (CoR)
- welcomes the opportunity to contribute to the EU's sustainable tourism strategy, conceived as a common framework that, while respecting subsidiarity and proportionality, will make it possible to (i) manage a growing and diverse influx of tourism without undermining territorial quality, coexistence or the tourist experience, and (ii) link tourism to European regions' pathways to growth and well-being, ensuring that it acts as a real driver of shared prosperity;
- recognises that, although tourism accounts for 9.7% of GDP and 11.1% of employment in the EU (1), its financial contribution may be compromised if it is not managed in a balanced and sustainable way. Its benefits are often cancelled out by negative effects on social cohesion, housing, the environment or cultural heritage;
- underlines the need for a change of approach, moving from sectoral approaches to a systemic vision of tourism that considers territorial diversity, drives innovation and promotes participatory governance;
- calls for the development of specific tools to measure sustainable tourism development beyond market shares or tourist flows, through a European system of comparable and harmonised indicators;
- points out that coastal and island regions that are tourist destinations are particularly vulnerable ;
- is concerned about the unregulated growth of short-term tourist rentals and its impact on access to housing, on social cohesion and on the functioning of public services ;
- urges the Commission and the Council to turn the forthcoming EU sustainable tourism strategy into an action plan with resources, a timetable and evaluation mechanisms ;
- suggests a years annual conference held by the Commission and theCoR on European Tourism (to;
COR-2025-01378-00-01-AC-TRA (EN) 1/12
EN

CoR Tourism Opinion

NECSTouR Tourism Advocacy Group



January 2026

European Tourism Day
NECSTouR TAG at the COR with MEP Attard



March

High Level Dialogue with Mayors



Open public consultation
Making European tourism statistics fit for the future

NECSTouR contribution to the Call for Evidence on the revision of Regulation (EU) No 692/2011 on European tourism statistics

Better tourism governance requires better tourism data.

Purpose of the Paper

NECSTouR welcomes the European Commission's initiative to review the regulatory framework for European tourism statistics. As the Network of European Regions for Competitive and Sustainable Tourism, we recognise the crucial role of robust, timely and relevant tourism statistics in supporting evidence-based policymaking and enabling destinations to successfully embed sustainability across their ecosystem. In particular, the transition towards more sustainable tourism requires new and more comprehensive data capable of measuring tourism's environmental, social and economic impacts at destination level.

This position paper constitutes NECSTouR's contribution to the Call for Evidence launched as part of the revision of Regulation (EU) No 692/2011 on European tourism statistics. Drawing on the experience of regional tourism authorities, which are both key users and important providers of tourism data within the European statistical ecosystem, this paper presents the collective views and recommendations of NECSTouR members. It identifies the main challenges of the current statistical framework and proposes recommendations to ensure that future tourism statistics better respond to the evolving needs of destinations, policymakers and the tourism sector.

NECSTouR welcomes the European Commission's commitment to engaging stakeholders throughout this review process and appreciates the opportunity to contribute to the development of a more comprehensive, timely and future-proof framework for European tourism statistics. We remain available to further discuss the recommendations outlined in this paper and to continue supporting the European Commission in shaping a statistical system that effectively serves Europe's destinations and contributes to more resilient, competitive and sustainable tourism policies.

July

Irish Presidency
Tourism priorities
EU Parliament & EU Tourism Manifes



October

EU Week of Regions and Cities

Networking EU Tourism Manifesto Alliance



November

ETF Dublin:
Expected Launch
EU Tourism Strategy

NECSTouR Position Paper



NECSTouR

FINAL VERSION

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Executive Summary of Key Recommendations

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- 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 resilience.
- Reinvisioning 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 wellbeing 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 Sustainable and Smart Mobility Strategy.
- Place data at the core of tourism governance and the strategy by mandating 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 transitions, 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.

Network of European Regions for a Sustainable and Competitive Tourism

December 2026

Lapland case | Bringing smaller regions into the European Tourism Data Space

REGIONAL COUNCIL OF LAPLAND

Through NECSTouR and the Tourism of Tomorrow Lab, Lapland joined DEPLOYTOUR as a project partner and leads its "Empowering SMEs in Tourism" pilot. ToTLab supports Lapland in shaping use cases, identifying data sources, engaging stakeholders and developing a prototype that connects tourism SMEs with accessible data-driven TravelTech solutions.

Challenges

- Smaller regional DMOs face barriers to joining strategic EU data initiatives.
- Tourism SMEs struggle to access and interpret complex datasets.
- Limited technical skills and resources restrict uptake of data spaces.
- Fragmented services make relevant TravelTech tools hard to discover.

Solution

- Connect Lapland with the DEPLOYTOUR consortium and give the region a voice.
- Co-design pilot use cases, map data sources and engage local stakeholders.
- Build an intermediary ecosystem linking SMEs and TravelTech providers.
- Develop a marketplace-style prototype for easy-to-use apps built on European Tourism Data Space data.

From European collaboration to action

DEPLOYTOUR • Empowering SMEs in Tourism
Pilot development in progress



A small destination with a big voice for a more data-driven and sustainable tourism in Europe.

DEPLOYTOUR
European Tourism Data Space

Five real-life pilots for a more competitive and **sustainable European tourism** ecosystem.

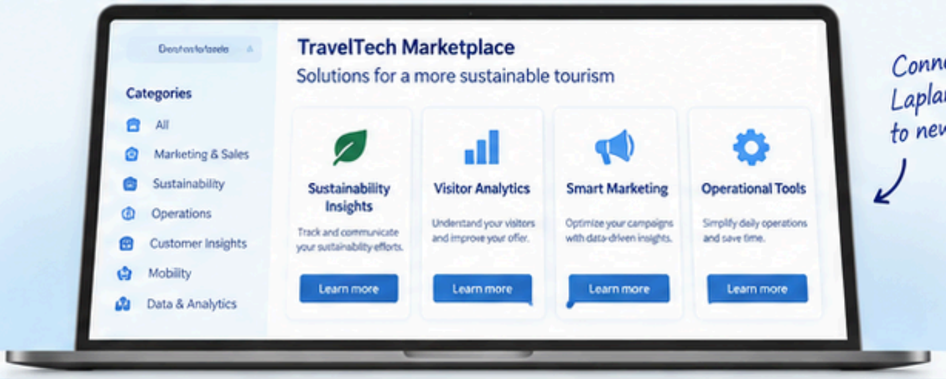
Tourism data → **TravelTech providers** → **Easy-to-use apps for SMEs**

- European Tourism Data Space

Innovative solutions and services

Stronger and more competitive tourism businesses

Pilot concept / prototype



Connecting Lapland's SMEs to new opportunities

Short-Term Rentals in Europe:
Towards a Fair, Transparent & Sustainable Visitor Economy

How do we capture the economic benefits of short-term rentals while ensuring:

- **fair competition**
- **housing availability**
- **tax compliance**
- **sustainable destination development**



How should destinations prepare?

- **Build registration systems now**
- **Invest in tourism intelligence**
- **Prepare tax & compliance frameworks**
- **Coordinate across policy areas - STRs are no longer solely a tourism issue**
- **Focus on proportionality**

Short-Term Rentals in Europe:
Towards a Fair, Transparent & Sustainable Visitor Economy

The European Union has now established a regulatory framework that acknowledges short-term rentals as a significant component of the tourism ecosystem requiring public oversight and transparency.

For destinations the message is clear:

1. **The EU is building the data infrastructure needed for effective regulation.**
2. **Future policy debates will increasingly focus on fair competition, tax compliance, impact on housing & destination management.**
3. **Regions that develop registration, monitoring & enforcement capacity now will be best positioned for future regulatory developments**

Short-Term Rentals in Europe:
Towards a Fair, Transparent & Sustainable Visitor Economy

The EU is moving from a largely unregulated short-term rental market towards a data-driven governance model.

The immediate focus is transparency and registration, but the broader policy direction is clear: better data, better enforcement, fairer competition and more sustainable tourism development.

For Finland, the challenge is not whether regulation will evolve, but how quickly destinations can prepare for a future in which all accommodation providers operate within a more transparent and comparable framework.



What do we know about the strategy? 1/3

Delivering the common EU vision for tourism:

A common brand: An EU model for tourism management

- Destination Europe – value and quality proposition intra/extra EU
- Common quality criteria for smart integrated destination management (drawing on MS experience)
- Quality label for destinations (incl existing sustainable destination awards)

Innovation for competitiveness – skills, data, technology, business support

- Jointly address skilling needs and labour shortages (incl building on Pact for Skills, EU Talent Pool, and private sector initiatives) by establishing an **EU Tourism Skills Academy**
- Establish **EU Tourism Data Space** (based on preparatory work, link other sectors)
- Innovation and simplification – support to tourism SMEs and startups

What do we know about the strategy? 2/3

Delivering the common EU vision for tourism:

Connectivity

- Support integrated sustainable long-distance and local mobility offer (incl multi modal journey planning, rail and coach ticketing, first/last mile)
- Support passenger rights and offer for persons with reduced mobility (review existing framework and link to inter-modal policy framework)

Sustainability, accessibility and balancing tourism flows

- Common tools for preserving natural and cultural diversity, supporting climate adaptation, accessibility, inclusion
- Common guidelines to address overtourism / support less developed destinations

Global Outreach

- Develop international cooperation, esp enlargement countries, UN,
- OECD, strategic partners (within established policy strands)

What do we know about the strategy? 3/3

Delivering the common EU vision for tourism:

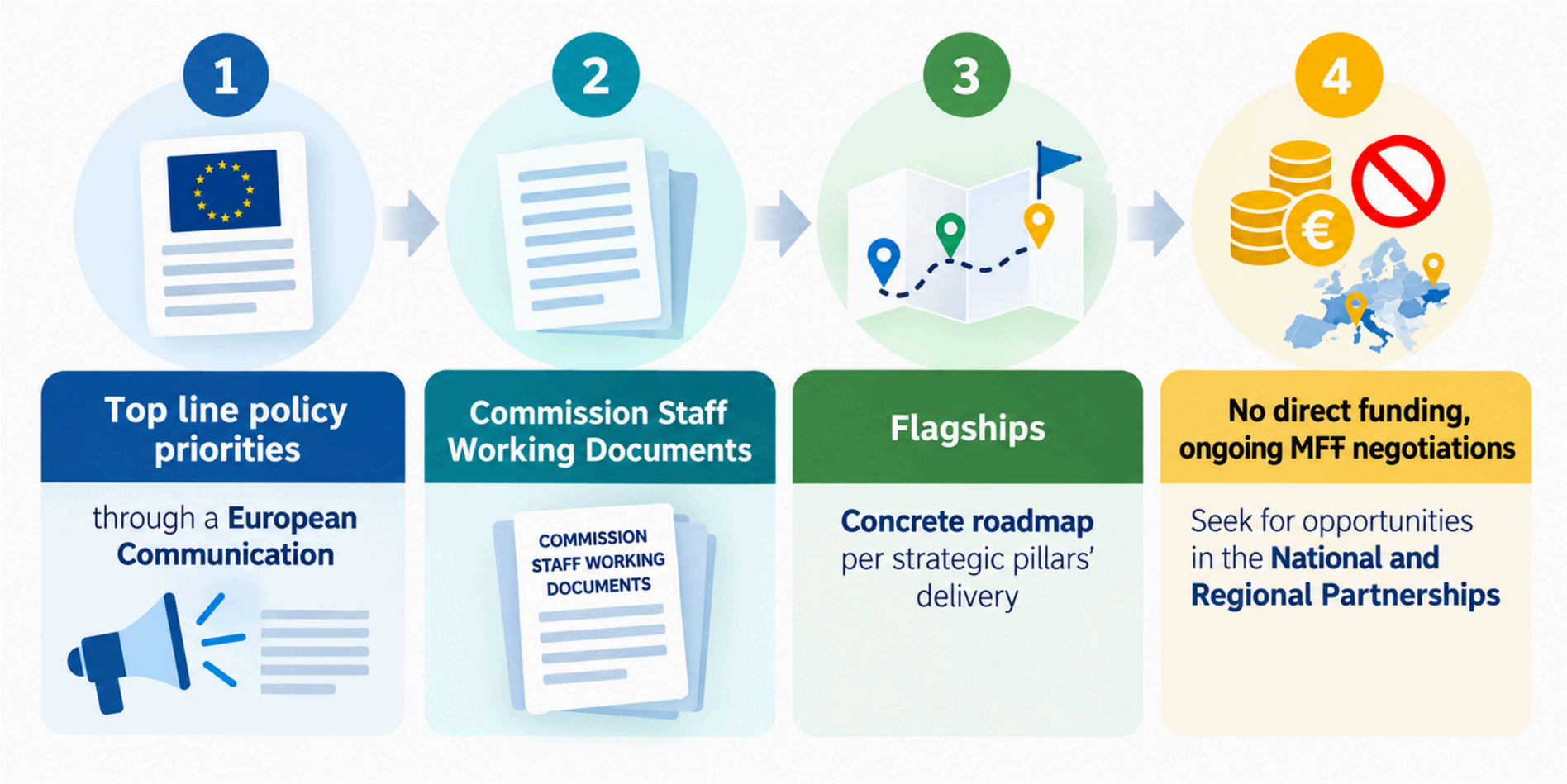
Governance:
Overcome fragmentation, reinforced model of public-private cooperation in EU tourism

- Co-ownership of the EU tourism implementation agenda (criteria, tooling)
- Rationalising of existing cooperation groups under umbrella of strategy

Funding:
Simplify and streamline support

- Creating investment paths from innovation to deployment
- Pooling (public) and leveraging (private) investment where possible
- Inter-linking with parallel policy strands (esp connectivity, innovation, culture, skills)

What can we expect?



Nothing is agreed until everthing is agreed...

Raising Lapland's Tourism Voice



NECSTouR
European Regions for
Competitive and Sustainable Tourism

How can we support you?

The journey continues...



“Authenticity as a Competitive Edge: Linking Sustainable Happiness, Climate Action and Destination Resilience.”

December 2026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Network of European Regions for a Sustainable and Competitive Tourism

The meeting between the Directors General of the National Tourism Agencies of the EU Member States will discuss key policy and strategic issues concerning European tourism, including national legislation and current developments affecting the tourism sector across Europe.

The European Tourism Forum (ETF) brings together government officials, industry leaders, and stakeholders to discuss the challenges and opportunities facing the tourism sector.



Meetings of Directors General for Tourism and the European Tourism Forum

3-4 November 2026

NECSTouR
European Regions for
Competitive and Sustainable Tourism

Thank you!



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