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

Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe

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1. INTRODUCTION

Tourism is a major economic activity with a broadly positive impact on economic growth and employment in Europe. It is also an increasingly important aspect in the life of European citizens, more and more of whom are travelling, either for leisure or business. As an activity which impinges on cultural and natural heritage and on traditions and contemporary cultures in the European Union, tourism provides a textbook example of the need to reconcile economic growth and sustainable development, including an ethical dimension. Tourism is also an important instrument for reinforcing Europe's image in the world, projecting our values and promoting the attractions of the European model, which is the result of centuries of cultural exchanges, linguistic diversity and creativity.

European tourism has recently experienced a difficult economic situation, aggravated by the eruption of the Eyjafjöll volcano, which has demonstrated both its vulnerability and its resilience, thanks to the importance Europeans attach to travel and holidays. Thus the economic and financial crisis, which has affected all economies since 2008, has had a considerable effect on demand for tourist services. More recently, the interruption of air traffic during April and May 2010 due to the presence of volcanic ash clouds had a major effect on travel in Europe, causing significant disruption to airlines, travel agencies and tour operators as well as tourists themselves.

This difficult background for the tourism industry has highlighted a number of challenges which the European tourism sector must face. In order to respond, it is essential that all operators in the sector combine their efforts and work within a consolidated political framework that takes account of the new EU priorities set out in the 'Europe 2020' strategy: Europe must remain the world's No 1 destination, able to capitalise on its territorial wealth and diversity.

With this communication, the European Commission intends to encourage a coordinated approach for initiatives linked to tourism and define a new framework for action to increase its competitiveness and its capacity for sustainable growth. It therefore proposes a number of European or multinational initiatives aimed at achieving these objectives, drawing in full on the Union's competence in the field of tourism as introduced by the Lisbon Treaty.

2. THE EUROPEAN TOURISM INDUSTRY, A KEY ELEMENT IN EUROPEAN GROWTH RESTING ON CLEARLY-DEFINED COMPETENCES

2.1 Growing economic importance

Tourism is an economic activity capable of generating growth and employment in the EU, while contributing to development and economic and social integration, particularly of rural and mountain areas, coastal regions and islands, outlying and outermost regions or those undergoing convergence. With some 1.8 million businesses, primarily SMEs, employing approximately 5.2 % of the total workforce (approximately 9.7 million jobs, with a significant proportion of young people), the European tourism industry[1] generates over 5 % of EU GDP, a figure which is steadily rising.[2] Tourism therefore represents the third largest socioeconomic activity in the EU after the trade and distribution and construction sectors. Taking into account the sectors linked to it,[3] tourism's contribution to GDP is even greater; it is estimated to generate over 10 % of the European Union's GDP and provide approximately 12 % of all jobs. In this regard, observing the trend over the last ten years, growth in employment in the tourism sector has almost always been more pronounced than in the rest of the economy.

In addition, the European Union remains the world's No 1 tourist destination, with 370 million international tourist arrivals in 2008, or 40 % of arrivals around the world,[4] 7.6 million of them from the BRIC countries (Brazil, Russia, India and China), a significant increase over the 4.2 million in 2004. These arrivals generated revenues of around EUR 266 billion, 75 billion of which was from tourists coming from outside the Union.[5] As regards journeys by Europeans themselves, they are estimated at approximately 1.4 billion, some 90 % of which were within the EU. According to estimates by the World Tourism Organisation (WTO), international tourist arrivals in Europe should increase significantly in the coming years. Finally, European tourists are one of the largest groups travelling to third countries, providing an extremely important source of revenue in many countries. These elements justify providing more detail of the external dimension of EU tourism policy, in order to maintain tourist flows from third countries but also to support EU partners, particularly in the Mediterranean.

2.2 Competences defined by the Lisbon Treaty added to an extensive track record

The European Commission, in cooperation with the Member States and associations representing the sector, has invested considerable effort over a number of years in implementing a series of actions intended to strengthen European tourism and its competitiveness.[6] At the same time, the Commission has also set up an integrated and highly

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1 Traditional suppliers of travel and tourism services (hotels, restaurants, travel agencies, car hire, charter airlines, tourist coaches, cruise vessels, etc.) offering goods and services directly to visitors.

2 Study on the Competitiveness of the EU tourism industry, September 2009 (cf. http://ec.europa.eu/enterprise/newsroom/cf/document.cfm?action=display&doc_id=5257&userservice_id=1&request.id=0).

3 In particular distribution, construction, transport companies in general (air, rail, maritime, bus/coach, etc.) and the cultural sector (including cultural and creative industries).

4 WTO World Tourism Barometer, Volume 8, January 2010.

5 Eurostat, Statistics in Focus, 23/2009 (Balance of payments statistics).

6 Communications from the Commission: Agenda for a sustainable and competitive European tourism (COM(2007)621 final); A renewed EU Tourism Policy - Towards a stronger partnership for European Tourism (COM(2006)134 final).

developed system to protect passengers and consumers, including those with disabilities or reduced mobility, on all means of transport.[7]

Over the years, the European Union has been able to lay the foundations for a European tourism policy, stressing those factors which determine its competitiveness while taking account of the need for sustainable development. With the entry into force of the Lisbon Treaty, the importance of tourism is recognised; the European Union now has powers in this field to support, coordinate and complement action by the Member States. It is a step forward which provides the necessary clarification and enables the setting up of a coherent framework for action.

As laid down by Article 195 of the TFEU, the European Union can therefore:

- promote the competitiveness of undertakings in this sector and create an environment conducive to their development;
- encourage cooperation between the Member States, particularly through the exchange of good practice;
- develop an integrated approach to tourism, ensuring that the sector is taken into account in its other policies.

This new legal framework is a real opportunity to carry out actions with a high European added value which take into consideration the concern to reduce administrative burdens. These actions are intended to benefit all countries in the European Union, as each of them, to differing degrees, has an interest in developing its tourist potential.

3. CHALLENGES AND OPPORTUNITIES FACING THE EUROPEAN TOURISM INDUSTRY

European tourism faces major challenges, which are at the same time opportunities. On the one hand, the industry must adapt to social developments which will influence tourist demand; on the other, it must face up to the constraints imposed by the sector's current structure, its specific characteristics and its economic and social context.

European tourism has recently faced a difficult economic situation, aggravated by the eruption of the Eyjafjöll volcano.

Firstly, the economic and financial crisis affecting all economies since 2008 has had a considerable effect on demand for tourism services. Although they have continued to travel, Europeans have adapted their behaviour to circumstances, in particular by preferring less distant destinations and reducing the length of stay or their spending.[8] Tourist activity in Europe therefore fell by approximately 5.6 % in 2009. This overall figure conceals wide disparities: some regions, especially in eastern or northern Europe, were particularly affected and recorded a net fall of up to 8 % in the number of tourists. The crisis is ongoing, and the prospects for growth in tourist activity are poor. Thus, although WTO estimates foresee a rise in international tourist arrivals from 2010, it appears that recovery will be slower in Europe than in other regions of the world such as Asia.

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7 http://ec.europa.eu/transport/passengers/index_en.htm

8 Overall in Europe, international tourist arrivals fell by approximately 5.6 % in 2009, although some regions, especially in eastern or northern Europe, recorded a fall of up to 8 % (WTO World Tourism Barometer, Volume 8, January 2010).

This situation has been aggravated by the interruption of air traffic during April and May 2010 due to the presence of volcanic ash clouds. Although the disruption is difficult to assess, some estimates put the number of cancelled international tourist arrivals at over 2 million, and the direct cost to tour operators at approximately EUR 1 billion. To this can be added the revenues lost by the hotel sector and other tourism-related activities, which are hardly balanced out by the gains made by some services, such as car hire or taxi services. The consequences of this suspension of flights and certain courses of action were examined during the videoconference organised by the European Commission with the Ministers and Secretaries of State for Tourism on 28 April 2010 to assess the impact of the volcano crisis on tourism.

This situation requires the sector to adapt to new constraints. A number of factors are today affecting the development of tourism activity in Europe.

As with every other sector, the tourism industry is facing increasing global competition, with emerging or developing countries attracting increasing numbers of tourists. Faced with this competition, Europe must offer sustainable and high-quality tourism, playing on its comparative advantages, in particular the diversity of its countryside and extraordinary cultural wealth.[9] It must also strengthen cooperation with those countries whose population can provide a source of visitors to European destinations as their standard of living increases.

Another significant challenge relates to the demographic trends observed in Europe and the new tourist behaviour or expectations which result. These changes require the industry to adapt quickly in order to retain its level of competitiveness. In particular, the number of persons aged over 65 is expected to reach 20 % of the population in 2020. This population group, consisting of individuals with both purchasing power and leisure time, represents significant market potential but also requires changes in the sector to meet its particular needs. The same applies to accommodating the increasing number of tourists with reduced mobility (recently estimated at 127 million persons), who have specific needs and must be integrated into the tourist supply and service structure.

Other structural challenges must be fully integrated into tourism policy. Thus the supply of tourism services must in future take into account constraints linked to climate change, the scarcity of water resources, pressure on biodiversity and the risks to the cultural heritage posed by mass tourism. Tourism businesses need to reduce their use of drinking water where there is a risk of drought, and reduce their greenhouse gas emissions and environmental footprint.

In the coming years, climate change in Europe could determine a restructuring of travel models and affect certain destinations. Moreover, declining snow cover in Europe's mountainous regions could cause a fall in winter tourism. At the same time, rising sea levels could bring changes for tourism in coastal areas. European and national tourism policies will need to take account of all these structural changes, both by taking measures to relieve structural unemployment and by ensuring effective distribution of tourism-related investment.

The development of information and communication technologies (ICT) and their increasing use by consumers has also radically changed the relationship between the tourism industry and its customer base. An assessment of the level of awareness, accessibility and use of these services by the various operators concerned has shown that they use ICT in different ways by

[9] 300 of the 800 UNESCO World Heritage sites are within the EU.

virtue of factors such as their basic skills, their size and their relative position in the tourist chain.

In the light of all these challenges and opportunities, businesses in the sector, particularly SMEs, are not always in a position to adapt rapidly, given their limited financial resources and their employees' lack of qualifications.

Finally, there are also specific challenges determined by the particular characteristics of the European tourism sector. These are linked on the one hand to consumer models, particularly seasonal distribution and tourist movements, and on the other to production models, i.e. the value chain and tourist destinations. Tourist demand is currently concentrated very strongly on the months of July and August. This seasonal aspect not only affects revenue flows, but results in non-optimum use of existing infrastructure and staff.

4. AMBITIOUS OBJECTIVES FOR A NEW ACTION FRAMEWORK

In the face of the crisis and the increasing constraints on its activity, European tourism must evolve. This requires changes at all levels. The European Union must contribute to this and encourage a voluntary policy to speed up growth and create the conditions for making tourism more attractive.

In line with the Lisbon Treaty, the main aim of European tourism policy is to stimulate competitiveness in the sector, while being aware that in the long term, competitiveness is closely linked to the 'sustainable' way in which it is developed. This aim is clearly linked to the Union's new 'Europe 2020' economic strategy, and in particular the flagship initiative 'An industrial policy for the globalisation era'. Moreover, tourism can also contribute to other flagship initiatives, particularly 'Innovation Union', 'A Digital Agenda for Europe'[10] and 'An Agenda for new skills and jobs'. In addition, the development of a more active tourism policy, based in particular on fully exercising the freedoms guaranteed by the Treaties, could make a significant contribution to relaunching the internal market.

The European action framework aims first of all to encourage the prosperity of tourism in Europe. But it must also respond to concerns relating to social matters, territorial cohesion and the protection of and capitalisation on natural and cultural heritage. Moreover, it will need to enable the sector to become more resilient to the impact of climate change and more able to mitigate the effects of the possible structural changes caused by tourism. Indirectly, tourism also helps to strengthen the feeling of European citizenship by encouraging contacts and exchanges between citizens, regardless of differences in language, culture or traditions. It is also important in this context that European citizens are aware of their rights and can take advantage of them when moving within or outside the European Union; they must be able to exercise their rights as European citizens as easily as within their own country. The Commission will propose solutions for minimising the obstacles encountered by European citizens when they try to obtain tourism services outside their own country.

These requirements for an ambitious European policy were recognised at the informal meeting of ministers for tourism organised on the initiative of the Spanish Presidency of the Council on 15 April 2010. Following the high-level conference on European tourism held in

[10] Communication from the Commission: A Digital Agenda for Europe (COM(2010) 245 final).

Madrid on 14 April 2010, which served as a 'summit' for the sector, this informal ministerial meeting represented a decisive step towards committing the Union and all the Member States to a competitive, sustainable, modern and socially responsible tourism sector. Thus the EU ministers for tourism supported the 'Madrid Declaration', which establishes a series of recommendations concerning the implementation of a consolidated European tourism policy, stresses the need to strengthen sustainable competitiveness in the sector and recognises the added value of action by the EU on tourism, providing a worthwhile complement to action by the Member States through an integrated approach to tourism.

To achieve these objectives, actions promoting tourism may be grouped under the following four priorities:

(1) Stimulate competitiveness in the European tourism sector;

(2) Promote the development of sustainable, responsible and high-quality tourism;

(3) Consolidate the image and profile of Europe as a collection of sustainable and high-quality destinations;

(4) Maximise the potential of EU financial policies and instruments for developing tourism.

These four priorities provide the skeleton for a new action framework for tourism which the Commission intends to implement in close cooperation with the Member States and the principal operators in the tourism industry.

5. A NEW ACTION FRAMEWORK TO MEET THE CHALLENGES

In accordance with the objectives set out above, and taking full account of the new institutional framework provided by the Lisbon Treaty, the European Commission is convinced that a number of European or multinational actions can be carried out while respecting the principle of subsidiarity defined by the Treaty and the competence of the Member States in the field of tourism.

5.1 Stimulate competitiveness in the European tourism sector

Improving the competitiveness of tourism in the EU plays a crucial role in strengthening the sector with a view to dynamic and sustainable growth. In order to achieve this objective, it is worthwhile developing innovation in tourism, reinforcing the quality of supply in all its dimensions, improving professional skills in the sector, attempting to overcome the seasonal nature of demand, diversifying the supply of tourist services and helping to improve statistics and analyses relating to tourism. The tourism sector has significant potential for the development of entrepreneurial activity, as the vast majority of tourism businesses are small and medium-sized enterprises (SMEs). Furthermore, there are important synergies with the arts and craft trades which can help to preserve the cultural heritage and develop local economies.

Promoting diversification of the supply of tourist services

The European Union can contribute to the diversification of supply by encouraging intra-European flows through capitalising on the development of thematic tourism products on a European scale. Transnational synergies can ensure better promotion and a higher profile for tourism. This may include the full range of heritage: cultural heritage (including cultural

itineraries), contemporary culture, protected natural sites, health and wellbeing (including spa tourism), educational, wine and food, historical, sport or religious tourism, agri-tourism, rural tourism, or tourism capitalising on the maritime and sub-aquatic cultural heritage, industrial heritage or the economic fabric of a region.

To this end, the Commission has already begun cooperating with the Council of Europe in the field of cultural tourism in order to better assess its impact and give it a higher profile. Cross-border initiatives have also been set up in recent years, such as European cycle routes or pilgrimage routes, i.e. the *Via Francigena* and Santiago de Compostela. The Commission considers that a number of these initiatives would benefit from recognition and from a European seal of legitimacy which would guarantee their transnational character. Such recognition of their European vocation could create a similar dynamic to that created by the success of the European Capitals of Culture, which act as a catalyst for local development and tourism by implementing an ambitious and attractive annual cultural programme on a European scale.[11] This experiment may also be extended to cover those regions forming part of the 'Natura 2000' network, which cover more than 17 % of European territory and are areas of interest for tourism, provided that the principles of conservation for the natural environments concerned are respected.

ACTIONS PLANNED:

(1) Develop a coherent strategy for diversifying the promotion of tourist services and capitalise on Europe's common heritage, particularly by creating a European heritage label, alongside actions such as European Heritage Days or the European Union Prize for Cultural Heritage.

(2) Encourage the integration into tourism strategies of 'natural' heritage, which will also benefit from labelling initiatives.

Developing innovation in the tourism industry

Innovation and new information technologies have become determining factors for the competitiveness of the tourism industry and for strengthening exchanges with other sectors linked to it. Their use by public and private tourism operators, particularly SMEs, should be strengthened through awareness-raising and partnership initiatives and appropriate use of various national and European programmes. There is also a need to accelerate the integration of information society tools and services into all tourism activities, particularly those carried out by SMEs, and facilitate access for the various tourism operators to the relevant financial instruments

ACTIONS PLANNED:

(3) The Commission will launch an 'ICT and tourism' platform for stakeholders to facilitate the adaptation of the tourism sector and its businesses to market developments in new information technologies and improve their competitiveness by making the maximum use of possible synergies between the two sectors.

(4) In preparing its forthcoming communication on electronic commerce in the internal

[11] On average, during the period 1995-2004, the number of overnight stays in cities holding the title in a given year increased by 12 % relative to the previous year.

market, which will assess the implementation of the electronic commerce Directive, the Commission will examine the possibilities for strengthening the integration of the tourism sector in this context.

Improving professional skills

The modernisation of tourism activity should be accompanied by a stepping-up of efforts to improve the professional skills of workers in the sector, with a particular view to facilitating their adaptation to new technologies and new market expectations, for example in terms of health and well-being, and encouraging their mobility. Such efforts would form part of the 'Europe 2020' strategy, and particularly the flagship initiative 'An Agenda for new skills and jobs'.

ACTIONS PLANNED:

(5) In order to support training in the tourism sector, the Commission will endeavour to promote the opportunities offered by various EU programmes such as Leonardo or the Competitiveness and Innovation Framework Programme (CIP) with its 'Erasmus for young entrepreneurs' and 'E-skills for innovation' strands.

Encouraging an extension of the tourist season

Better use of existing tourist infrastructure and staff in the low season could enable businesses to make better use of their infrastructure and improve their productivity, providing a more stable and motivated workforce. A first step in this direction has already been taken with the CALYPSO initiative,[12] which has given rise to an inventory of existing good practice within Member States.

ACTIONS PLANNED:

(6) Provide a voluntary tourism exchange mechanism between Member States,[13] enabling in particular certain key groups such as young or elderly people, people with reduced mobility and low-income families to travel, particularly during the low season.

(7) Develop a voluntary online information exchange mechanism to improve the coordination of school holidays in the Member States, without prejudice to their cultural traditions.

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12 CALYPSO is a preparatory action adopted by the European Parliament in 2008 for a three-year period with the objective of promoting partnerships between the public and private sectors and the social economy, driven by the European Commission, with the main aim being out-of-season exchanges of tourists in four target groups (young and elderly people, people with reduced mobility and low-income families) under Calypso, at least between two Member States and/or candidate countries.

13 Existing good practice, particularly from the Iberian peninsula, shows that the public sector can finance such mechanisms with a positive return on investment (over EUR 1.5 per euro spent) if account is taken of the benefits brought about by the creation of jobs, additional opportunities offered to the private sector and tax revenues generated by increased activities. These benefits also have a positive impact in the country of origin.

Consolidating the socioeconomic knowledge base for tourism

To make the sector more competitive, the Commission considers it essential to have a better socioeconomic knowledge base at European level for tourism and its relationship with the environment. In this regard, the ongoing review of Directive 95/57/EC on the collection of statistical information in the field of tourism is an important step, as it will take account of trends in European tourism and the needs of users.

However, there is a case for going further and encouraging cooperation at European level between Member States, destinations, industry representatives and public and private operators in order to consolidate statistics and analyses relating to the sector. In order to do this while retaining its role in coordinating statistical activity at European level (devolved to Eurostat), the Commission considers it necessary to develop knowledge networks between research institutes, universities and public and private monitoring units, in close cooperation with regional and national authorities, national tourism offices, statistical institutes and other operators. The coordination and development of research in the field of tourism on a European scale are essential for a more integrated approach and greater synergy. It also includes cooperation with European and international organisations, such as the OECD and WTO.

ACTIONS PLANNED:

(8) In its annual communication, 'Consumer Markets Scoreboard', the Commission will monitor the market by measuring European consumer satisfaction with various tourism services (transport, hire, accommodation, travel, package tours).

(9) In the short term, the Commission will develop a pilot project aimed at networking research institutes, universities, public and private monitoring units, regional and national authorities and national tourism offices.

(10) In the medium term, based on the results of the pilot project, the Commission will promote the implementation of a 'virtual tourism observatory' to support and coordinate research activities by the various national research institutes and provide socioeconomic data on tourism at European level.

5.2 Promote the development of sustainable, responsible and high-quality tourism

The sector's competitiveness is closely linked to its sustainability, as the quality of tourist destinations is strongly influenced by their natural and cultural environment and their integration into a local community. The sustainability of tourism covers a number of aspects: the responsible use of natural resources, taking account of the environmental impact of activities (production of waste, pressure on water, land and biodiversity, etc.), the use of 'clean' energy, protection of the heritage and preservation of the natural and cultural integrity of destinations, the quality and sustainability of jobs created, local economic fallout or customer care. These principles are largely reflected in tourism strategies introduced at national and regional level, although they find insufficient expression in specific actions.

At EU level, the Commission has introduced a number of tools to facilitate sound environmental management for businesses, such as the EU Eco-label or the Community eco-

management and audit scheme (EMAS). However, the response from tourism businesses across Europe to concerns about sustainability has varied widely. The Commission has also made available to Member States documents facilitating the implementation of European environmental legislation, in terms of both individual projects and strategic planning.[14]

In this context, the Commission will be supported by the initiative implemented in cooperation with the Network of European Regions for a sustainable and competitive European tourism (*NECSTouR)* and the EDEN destinations network with a view to developing a system of indicators for the sustainable management of destinations. This practice should be extended in order to make it possible to enhance the value of European tourist destinations which adopt effective practices to promote the sustainability of tourism. In this regard, it is essential to encourage initiatives which promote responsible management of resources (energy, water, raw materials, etc.) and guarantee optimum conditions for services and safety, particularly when catering for elderly people or those with reduced mobility.

ACTIONS PLANNED:

(11) Develop, on the basis of NECSTouR or EDEN, a system of indicators for the sustainable management of destinations. Based on this system, the Commission will develop a label for promoting tourist destinations.

(12) Organise awareness-raising campaigns for European tourists concerning the choice of destinations and means of transport, relationships with the local population in the destinations visited, and combating the exploitation of woman and children.

(13) Develop a European '*Qualité Tourisme*' brand, based on existing national experience, to increase consumer security and confidence in tourism products and reward rigorous efforts by tourism professionals whose aim is quality of tourism service for customer satisfaction.

(14) Facilitate identification by the European tourism industry of risks linked to climate change in order to avoid loss-making investments, and explore opportunities for developing and supplying alternative tourism services.

(15) Propose a charter for sustainable and responsible tourism and establish a European prize for tourism businesses and destinations respecting the values set out in the charter.

(16) Propose a strategy for sustainable coastal and marine tourism.

(17) Establish or strengthen cooperation between the European Union and the main emerging countries (China, Russia, India, Brazil) and Mediterranean countries to promote sustainable and responsible tourism development models and the exchange of best practice.

[14] http://ec.europa.eu/environment/nature/natura2000/index_en.htm.

5.3 Consolidate the image and profile of Europe as a collection of sustainable and high-quality tourist destinations

The image and perception of Europe as a collection of tourist destinations are aspects closely linked to the competitiveness of tourism.[15] Given the intensity of global competition, but also the potential of a number of third countries as sources for tourism in Europe, it is essential to carry out actions aimed at stimulating tourist demand for Europe. There is already one important initiative for promoting Europe among third countries through the visiteurope.com website, administered by the European Travel Commission (ETC) and launched in 2006 with the support of the European Commission.

The image of Europe and its perception as a collection of sustainable and high-quality tourist destination must be improved. Making European destinations more attractive and raising their profile should bring significant economic benefits, by stimulating non-European tourist arrivals and also by increasing interest by Europeans in travelling within their own continent.

With a view to exploring the best options for the joint presentation of Europe's supply of tourist services, the Commission considers it necessary to promote this image in world markets, and particularly in certain third countries (e.g. the USA, Japan, China, Russia, India and Brazil) through joint initiatives with the Member States and European industry.

To this end, it is worthwhile exploring a number of paths with a view to adding value to and raising the profile of various themed European or multinational products, particularly at large-scale tourism fairs or exhibitions, or to encourage capitalising to a greater extent on major cultural and sporting events such as the European Capitals of Culture, European Heritage Days, the Olympic Games or universal exhibitions, which provide the potential for increased development of tourism in Europe.

ACTIONS PLANNED:

(18) Create a true 'Europe brand' in cooperation with the Member States to complement promotional efforts at national and regional level and enable European destinations to distinguish themselves from other international destinations.

(19) Promote the visiteurope.com website in order to increase the attractiveness of Europe as a collection of sustainable and high-quality tourist destinations, particularly among emerging countries.

(20) Encourage joint promotional actions at major international events or large-scale tourism fairs and exhibitions.

(21) Strengthen European Union participation in international bodies, particularly within the context of the World Tourism Organisation, the OECD, T20 and Euro-Med.

[15] Study on the Competitiveness of the EU tourism industry, September 2009 (cf. http://ec.europa.eu/enterprise/newsroom/cf/document.cfm?action=display&doc_id=5257&userservice_id=1&request.id=0).

5.4 Maximise the potential of EU financial policies and instruments for developing tourism

Tourism policy is characterised by its transverse nature. A large number of other European policies have a direct or indirect impact on tourism. This is particularly true of transport policy (sustainable mobility, passenger rights and safety and transport quality), competition (questions concerning the concentration of businesses, particularly in offering tourist services online, vertical integration and public aid), the internal market (freedom of establishment and freedom to provide tourism-related services, promotion of service quality, development of electronic commerce), taxation (tax obstacles to the smooth operation of the internal market, treatment of businesses in the sector such as travel agencies, tax concessions), consumer protection (rights deriving from signature of the contract, unfair commercial practices, distance sales), the environment, employment and training, culture or regional and rural development policy.

The Commission is determined to ensure better integration of tourism into its various policies and ensure that the proper application of the legislation in force releases the sector's full competitive potential. It will step up its efforts to coordinate the various policies concerned, with the aim of ensuring that the interests and needs of the tourism industry are fully taken into account when formulating and implementing its policies.

With regard to internal market policy, the tourism sector should in future benefit fully from the integration of the European market in services. In particular, Directive 2006/123/EC of the European Parliament and of the Council of 12 December 2006 on services in the internal market will enable a significant simplification of procedures for service providers in the tourism sector and the elimination of a number of legal and administrative obstacles which have hitherto restricted their access to various markets in the European Union Member States.

The Commission recognises the substantial importance of maritime and coastal tourism as a catalyst for economic development and intends to carry out actions to encourage its development as part of the EU's integrated maritime policy. Economic diversification into tourism represents a priority for many coastal areas, where the decline in economic activities linked to fisheries and shipbuilding in particular have led to a fall in incomes and increased unemployment. This diversification is supported by the European Fisheries Fund (EFF) as part of local development strategies. Ways of realising the potential of the nautical and pleasure boat industry for the economic growth of the islands and coastal and maritime regions will also be explored.

EU rural development policy is also of considerable importance to the tourism sector. Through the European Agricultural Fund for Rural Development (EAFRD), the Commission can support, among other things, the establishment of businesses active within rural tourism, the development and promotion of agri-tourism and capitalisation on the cultural and natural heritage of rural regions, including mountain areas.

For the current programming period, the Commission will continue to promote and mobilise Community support instruments and programmes in favour of tourism. These instruments include the various European structural funds (ERDF, ESF), the European Agricultural Fund for Rural Development (EAFRD), the European Fisheries Fund (EFF) and the framework programme for research and development, which will continue to finance the setting up of specific projects. Finally, the Competitiveness and Innovation Framework Programme (CIP) is of particular importance to tourism in that, since 2008, it has supported the creation of

European networks for competitive and sustainable tourism. For the period after 2013, possibilities for supporting tourism through the various European funds and by consolidating existing preparatory actions in this field will depend on the guidelines adopted with regard to the European Union's action priorities, bearing budget constraints in mind.

Developing the rights of air and rail passengers is of significant importance for European tourism thanks to a legal framework which protects tourists encountering difficulties while travelling. The Commission's aim is for passengers travelling by sea, bus and coach to have similar rights. The ongoing review of the Directive on package travel, package holidays and package tours is another positive element in reinforcing consumer confidence in the tourism industry. Moreover, the Commission will continue to cooperate closely with the Member States, the tourism industry and stakeholders' organisations in the sector to improve safety in accommodation structures, particularly with regard to fire risks.

In addition, aware of the growing importance of tourism for Europe, including tourism from third countries, the Commission will examine the various possibilities and instruments under the policy on visas and external border crossings in order to make optimum use of them.

In order to enable European tourism to continue to develop in a competitive and sustainable manner, in accordance with the 'Europe 2020' strategy and the Lisbon Treaty, the Commission will examine ways of reinforcing actions supporting and coordinating European tourism.

6. CONCLUSION

European tourism policy needs a new impetus. Faced with challenges which require concrete responses and efforts to adapt, operators in the European tourism industry need to be able to combine their efforts and work within a consolidated political framework which takes the EU's new priorities into consideration. Taking account of the European Union's new competences in the field of tourism, this communication defines an ambitious framework for making European tourism a competitive, modern, sustainable and responsible industry. The Commission envisages a number of specific initiatives to give the European tourism sector the means to adapt and develop. These actions complement the policies of the Member States and aim to coordinate efforts by determining measures which provide a real European added value. The success of this strategy will depend on the commitment of all stakeholders and on their capacity to work together to implement it.

In the future, the Commission will continue its efforts to have regular, rapid and transparent exchanges of views with the Member States and the tourism industry on initiatives relating to tourism. In order to do this, it will rely in particular on the advisory committee on tourism. Public administrations will also be in a position to inform the various national and regional stakeholders of Commission initiatives on a regular basis.

This consolidated framework is a first step. For this reason, the Commission will continue to discuss tourism initiatives between now and the European Forum on tourism in November 2010, when a more detailed action plan may be discussed with the Member States and with public and private European tourism operators. In the medium term, it will then take stock of the strategy in order to assess its success and move forward.