10-11 NOVEMBER 2020

BRINGING TOGETHER THE CLUSTER COMMUNITY

Ecosystem session: TOURISM

Clusters strengthening ecosystems







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Milosz Momot - Deputy Head of Unit Tourism, Textiles and Creative Industries - DG GROW







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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".

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Industrial Ecosystems in Europe

- Passenger transport and travel
- · Hotels, short term accommodation

Creative

& Cultura

Industries

- Restaurants and catering
- · Events, theme parks

Tourism

Industrial



cooperatives aiming at generating a social impact, often proximity based

· Social enterprises, associations and

- Retail sales
- · Wholesale connected to consumers

Proximity

& Social

Economy

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

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

· Production of textiles, wearing

Building of residential and non-residential estates.

- · Building of roads and railways,
- · Building of utilities and civil engineering
- · Associated activates

Digital

- Telecommunications
- Software publishing, computer programming and consultancy
- · Data processing, hosting, web portals
- · Manufacturing of computers, communication equipment and consumer electronics
 - Pharmaceuticals and other medical products
 - Personal protective equipment
 - · Medical services, hospitals, nursing homes, residential care

Ecosystems for the Recovery

Textiles

· Raw starting materials (semiconductor wafers)

apparel, footwear, leather and, jewellery

- · Semiconductor manufacturing tools
- Design and manufacturing of semiconductor components

- Health
 - Plant and animal production
 - · Processing of food

Intensive Industrie

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

Agri-

Food

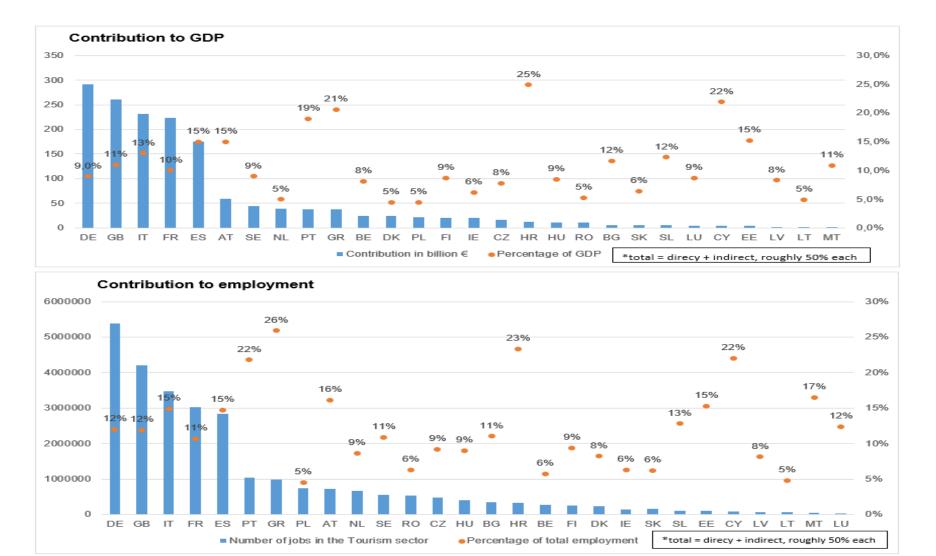
- Electric power generation
- Manufacturing and distribution of gas

· Electric motors, engines and turbines

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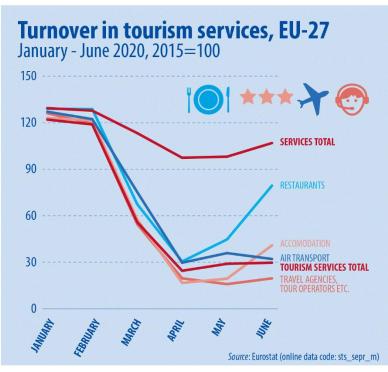
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Travel and Tourism Economic Total* Impact 2019 (2018 figures)

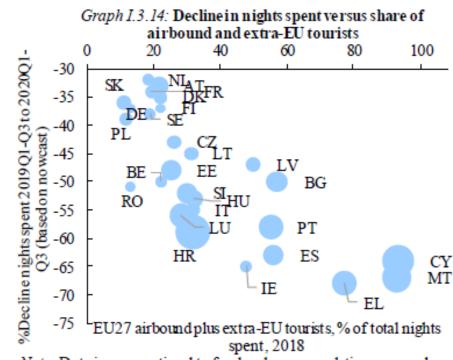


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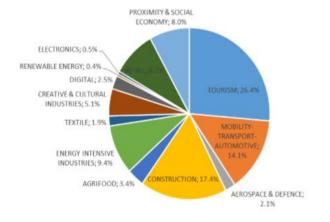
ec.europa.eu/eurostat



Note: Dot size proportional to food and accommodation gross value added as % of total economy gross value added.

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

Equity losses per ecosystem, share of total ecosystems losses



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	

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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)



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Perceived importance of the action points proposed by the <u>Safe and</u> <u>seamless tourism experience</u> workshop

 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.

62.06

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

64.96

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. 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 95

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).

ALC.

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.

67 70

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Perceived importance of the action points proposed by the <u>Greener</u> holidays workshop

1/To build a Marshall Plan to finance the destinations' transition towards sustainable tourism and adaptation to climate change

65 %

2/To engage consumers via reliable and easy to represent sustainable tourism data, products and connected infrastructure

55.9

3/To step up commitments to meet the European Green Deal goals, supported with data collection, monitoring, and disclosure of GHG across the value chain.

54 %

4/To empower tourism SMEs and destination management and marketing organisations with innovation capabilities, financial instruments, and legal frameworks. 5/To incentivise the transition to climate-neutral EU tourism (e.g., voluntary standards, regulations, and financing instruments for resource-efficiency innovations).

57 %

6/To strengthen multidisciplinary engagement and R&D to develop clear alternative fuels mobilities technologies. To invest in adequate infrastructure and distributions channels.

36 %

7/To upskill and reskill the management level on the destinations, public authorities and businesses about mitigation & adaptation measures

D 549

8/To assure open access and ownership of relevant data for business and destinations innovation

34 %

9/To speed up business accelerations and uptake of sustainable innovations in product, services, and processes.

51 %

10/To improve legal frameworks and develop more coordinated adaptation and mitigation strategies, to implement partnerships to decarbonise tourism destinations

43 %

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Perceived importance of the action points proposed by the <u>Tourism</u> powered by data workshop

 $1/\!\!$ To enhance data skills within tourism administrations at all levels of government and SMEs.

60 %

2/To work towards appropriate harmonized and interoperational tools for tourism relevant data exchange for B2G (i.e., ensuring data portability, transparency, ownership and liability issues, and enforcement of consumer and employee protection).

52.%

3/To promote public-private partnerships to establish new cooperation structures for data management and enhanced coordination for data sharing.

55.00

4/To capitalise on the availability of data and use data analytics for reaching a smart and sustainable recovery of the tourism industry.

50.96

5/Common framework for security, legacy, standards, and data protection.

48 %

6/To make funding available and increase awareness of funding opportunities available to tourism enterprises to help them become digital, also including training opportunities.

68.96

7/To promote open access to data and interoperability (crosssector data sharing, overcoming silo structures in administrations); To promote "openness" in the European travel data ecosystem at a micro-level through the promotion of living labs.

52 9

8/To make tourism data (official statistics and big data) more easily shareable and integratable via application program interfaces (APIs). 9/To support Eurostat by enhancing private sector to fill the gaps of tourism information (e.g., data from travel platforms), B2B sharing insights.

40.96

10/To work towards data sharing for multimodality travel and destination management.

53.94

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Thank you







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