

Tourism in the National Recovery and Resilience Plans of the EU member states

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Abstract

European Union member states have approached the tourism sector differently in the formulation of their respective National Recovery and Resilience Plans (NRRPs). An analysis of these plans has identified common themes, including digital and green transitions, sustainability, diversification of tourism offerings, and the development of workforce skills as integral components of strategic tourism development. Through a qualitative content analysis and comparative evaluation of all NRRPs, we assessed these plans based on three criteria: (1) Relevance to Tourism, (2) Support for Sustainable Tourism, and (3) Inclusion of Reform Components. This evaluation also highlighted the connections between NRRPs and the European Agenda for Tourism and the Transition Pathway for Tourism. The results indicate that NRRPs align with EU strategic priorities and effectively tackle country-specific challenges within the framework of the European Semester, underscoring the pivotal role of tourism in the EU's overall strategy.

Keywords: recovery, resilience, tourism, NRRP, EU

Introduction

Tourism has been strongly affected by COVID-19. In Europe, the number of jobs lost was 3.6 million, and tourism's contribution to the EU's GDP reached a record low level of about 5%¹. In fact, the pandemic illuminated the weaknesses and vitality of the sector, but at the same time it was also perceived as an opportunity for its more sustainable transformation. In this context, in December 2020, the EU adopted NextGenerationEU - a temporary recovery instrument to help repair the immediate economic and social damage brought about by the pandemic. NextGenerationEU has a budget of EUR 750 billion and will be used in the period 2021-2026. The main mechanism for its implementation is the Recovery and Resilience Facility, thanks to

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¹ Relaunching transport and tourism in the EU after COVID-19. Part IV: Tourism sector. [https://www.europarl.europa.eu/RegData/etudes/STUD/2021/690884/IPOL_STU\(2021\)690884_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2021/690884/IPOL_STU(2021)690884_EN.pdf)

which Member States will receive support of a total value of EUR 723.8 billion after the presentation and approval of the so-called National Recovery and Resilience Plans (NRRPs)².

These plans allow the countries to fund key investments and reforms for the restoration and strategic transformation of all economic sectors, including Tourism. In this context, the paper aims to answer to what extent do EU member states align their tourism strategic goals with their national resilience and recovery plans as instruments to respond to external shocks and crises like natural disasters, economic downturns, or the COVID-19 pandemic, and what specific measures are incorporated in national resilience and recovery plans to enhance their adaptability and recovery in the tourism sector. At the time of writing this article, there is no information that any other similar research and analysis has been done on the place the tourism sector occupies in the NRRPs.

Prior research on EU policy objectives in the field of tourism has typically focused on attracting higher-spending tourists, enhancing product quality, and mitigating seasonality (Akehurst et al., 1993). This suggests that the desired outcomes have, in broad terms, remained consistent but have been adjusted to align with the evolving context.

Each NRRP is constructed upon six pillars that embody vital EU policy domains, aimed at empowering Member States to rebound effectively from the crisis and ensure their resilience in the future. These pillars not only delineate investment priorities but also outline the extent of financial support available through the Recovery and Resilience Facility (RRF) tool.

In the realm of tourism, particularly within the tourism sector, recent significant EU documents like the Transition Pathway for Tourism³ and the European Agenda for Tourism 2030⁴ address similar overarching concerns. However, they do so with distinct perspective in terms of topics, actions and outputs. The transition pathway urges the tourism sector to undertake actions in twenty-seven specific topics, which encompass: (1) commitment to circular practices to diminish energy, waste, water, and pollution while meeting the rising need for sustainable tourism; (2) improvement of data sharing methods to facilitate innovative tourism services and enhance the sustainable administration of destinations; (3) allocation of resources to develop skills, ensuring the presence of a skilled workforce and appealing career opportunities within the ecosystem.

Despite its well-documented economic and social significance, as well as its

² Recovery and Resilience Facility. https://commission.europa.eu/funding-tenders/find-funding/eu-funding-programmes/recovery-and-resilience-facility_en

³ Transition Pathway for Tourism, <https://ec.europa.eu/docsroom/documents/49498/attachments/1/translations/en/renditions/native>

⁴ European Agenda for Tourism 2030, <https://data.consilium.europa.eu/doc/document/ST-15441-2022-INIT/en/pdf>.

promising growth prospects over the next two decades, tourism has faced challenges in receiving the necessary political recognition within the European Union. Rita (2000) contends that there is a compelling case for acknowledging European tourism as a forward-looking endeavour capable of addressing critical political goals, including fostering economic growth, employment, regional development, and cultural heritage preservation.

Our research on Tourism in the National Recovery and Resilience Plans of the EU Member States is centred around the following *key questions*:

1. Tourism Prioritization in NRRPs - To what extent do EU Member States distribute funding and prioritize the tourism sector in their National Recovery and Resilience Plans (NRRPs) for strategic development?
2. Digital and Green Transition in Tourism - How do NRRPs specifically address the digital and green transition within the tourism sector? What measures are outlined to promote sustainability and mitigate the environmental impact of tourism?
3. Alignment and consistency of NRRPs with broader EU strategies and goals related to tourism priorities, such as the Transition Pathway for Tourism and the European Agenda for Tourism 2030? By analysing these aspects, we aim *to extract valuable insights from the diverse approaches undertaken by EU Member States regarding their tourism sectors within their NRRPs.*

The paper is organized in following sections - main issues related to the recovery and resilience of tourism industry's future; methodology: approach, analytical framework, and constraints; tourism's position in the NRRPs: interplay with the European agenda for tourism 2030 and Transition pathway for tourism; key insights derived from NRRPs analysis and comparative evaluation followed by limitations, discussions and in closing - conclusions and recommendations.

1. Recovery and Resilience for the future of EU Tourism development

Recovery and resilience are complex issues, not a one-size-fits-all concept and are context-dependent. However, the resilience theory provides a holistic framework for understanding and assessing how EU Member States approach tourism within their NRRPs in the face of external shocks and crises. It offers valuable insights into the strategies, policies, and measures that can enhance the tourism sector's resilience, adaptability, and sustainability, aligning well with the research questions' focus on these critical aspects.

The resilience theory addresses the ability of systems or destinations to cope with and recover from disturbances, shocks, or crises (Butler, 2017; Hall et al., 2017; Hall et al. 2023; Lew, 2014). Factors for slow or long-term and fast resilience or short-term resilience have been explored (Cheer et al., 2017), including planned and/or adaptive resilience strategies (Lee et al., 2013) aimed at overcoming and extending the crisis management efforts (Prayag, 2018). The theory focuses on the

development of strategies for recovery, encompassing measures, activities, and results. Of particular significance is the capacity-building aspect, which plays a crucial role in enhancing the tourism sector's ability to recover from disruptions and adapt to changing circumstances. Moreover, the resilience theory often intersects with sustainability principles, emphasizing the importance of building systems that can endure and thrive over the long term. Referring to our research, this can help evaluate the sustainability aspects of NRRPs and how they contribute to the long-term resilience of the tourism sector. The resilience theory provides a framework for evaluating the coherence of Policy alignments. The theory recognizes the importance of diversifying resources and strategies to mitigate risks and enhance adaptability.

The analysis of Tourism in NRRPs is crucial for gaining insights into the forthcoming trajectory of EU tourism development in various domains as:

- *Post-Pandemic Recovery in Tourism*. Essential for Europe's economic, social, and cultural well-being. It not only provides economic benefits but also contributes to regional development, cultural preservation, and the promotion of sustainable practices (European Parliament, 2015; 2021). Europe's commitment to revitalizing its tourism sector can lead to a brighter and more resilient future (Gössling et al., 2020; Gretzel et al., 2020; Ioannides & Gyimóthy, 2020; Sigala, 2020; Škare et al., 2021; Sharma et al., 2021);
- *Green and Digital Transition in Tourism* or how EU Member States incorporate them into their NRRPs, shaping the industry's future direction. Essential for ensuring the industry's long-term viability, resilience, and competitiveness. It aligns with global sustainability goals, meets traveller preferences, and offers economic benefits while safeguarding the environment and preserving cultural heritage (Gretzel et al., 2020; Hall et al., 2023)
- *Resilience Building* for long-term sustainability. It protects economies, jobs, communities, and the environment while ensuring that tourism remains a vibrant and competitive sector, even in the face of challenges. Diversifying the economy through tourism can make Europe more resilient to economic shocks, such as recessions. It provides an added source of income that can offset losses in other sectors during crises (Ritchie & Jiang, 2019).
- *Economic Impact* based on effective recovery and development strategies; Tourism is a major economic driver for many European countries. It contributes significantly to GDP, employment, and tax revenues. The industry includes a wide range of businesses in most SMEs, making tourism vital for Europe's economic well-being. Tourism provides millions of jobs across Europe, often in regions where alternative employment opportunities are limited. A strong tourism sector can help reduce unemployment rates, especially among youth and in rural areas.
- *Sustainable Tourism*: or how it is incorporated and prioritized in order to achieve Sustainable Development Goals (SDG). Sustainable tourism is not only an ethical choice but also an economic and environmental necessity for Europe. It

safeguards the natural and cultural treasures, supports local communities, and positions Europe as a responsible and attractive destination for travellers worldwide (Higgins-Desbiolles, 2021; Brunnermeier, 2021);

- *Policy Alignment*: as areas for further improvement, contributing to more coherent and effective policymaking. Policy alignment and the inclusion of reform components in tourism strategies are essential for promoting sustainable, competitive, and resilient tourism in Europe. These measures ensure that the sector remains in line with EU goals, attracts investment, adapts to changing circumstances, and preserves Europe’s cultural and natural heritage. This foundation for cross-sectoral collaboration within pertinent EU policy areas, such as transport, regional policy, environment, consumer protection, culture, and, when applicable, health, aims to establish a harmonious and conducive policy framework for the tourism industry⁵.

This research and main findings serve as a valuable resource for a diverse set of stakeholders, all of whom have an interest in the recovery and future sustainability of the tourism sector in EU Member States.

2. Methodology

2.1. Approach

Our approach primarily centred on qualitative content analysis and comparative evaluation. We have conducted desk analysis of all NRRPs plans with major focus on activities *explicitly related* to Tourism in the national context, without a special division within the six major policy pillars (green transition, digital transformation, smart, sustainable and inclusive growth, social & territorial cohesion, health and economic, social and institutional resilience, policies of next generation). In our quest to address the three research questions outlined below, we have devised three corresponding criteria for our analysis:

Research questions	Criteria
1. Tourism Prioritization in NRRPs	Relevance to Tourism: This criterion pertains to elements within the NRRPs that directly relate to tourism or have explicit significant impact on the tourism sector within the six major pillars. It encompasses measures, projects, and strategies that specifically target tourism development and recovery.
2. Digital and Green	Support for Sustainable Tourism This criterion delves into components of the NRRPs that support digitalization and sustainable tourism practices, eco-friendly

⁵ Council of the European Union, Council conclusions on ‘European Agenda for Tourism 2030’ <https://data.consilium.europa.eu/doc/document/ST-15441-2022-INIT/en/pdf>.

<p>Transition in Tourism</p> <p>3. Alignment and Consistency with EU Strategies and Goals</p>	<p>initiatives, preservation of natural and cultural heritage, among other related aspects.</p> <p>Reform Components</p> <p>This criterion spotlights elements related to regulatory adjustments and framework reforms. These encompass new strategies and policies referring to Workforce Skills, Employment in Tourism, corresponding to the transformative changes and development of Tourism.</p>
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In this manner, we have systematically organized our research approach to navigate the multifaceted landscape of EU NRRPs in the context of tourism priorities. Moreover, these criteria match the Transition Pathway for Tourism⁶ approach in terms of clearly defined measures and outputs needed to accelerate the green and digital transitions and improve the resilience of the tourism ecosystem.

In our approach, we have excluded financial aspects of allocation of funds, investments, including grants, loans, or other financial aid for tourism recovery and development. While acknowledging their importance, our deliberate choice to concentrate on policy content and strategies was driven by our desire to conduct a more comprehensive and actionable analysis in line with our research aims. This approach enables us to supply meaningful insights into how EU nations are formulating their tourism sectors for post-pandemic recovery and resilience. We made this decision because financial resources allocated to specific initiatives and investments are intertwined with the broader policy framework and pillars rather than being explicitly earmarked for the tourism sector.

The decision not to consider financial allocations in favor of a more comprehensive analysis of policy content, strategies, and planned activities is rooted in several strategic rationales:

- *Strategic Focus on Tourism:* Our foremost goal was to evaluate the strategic approach and planned activities within NRRPs and their potential impact on the tourism sector. We believe that the content, policies, and strategies outlined in these plans play a pivotal role as drivers of change, directly influencing the sector's recovery and resilience.
- *Comparative Insights:* We sought to conduct a comparative analysis to glean insights from diverse EU countries. This approach allows us to distill valuable lessons and best practices, providing meaningful takeaways for policymakers and stakeholders seeking to enhance their tourism strategies.
- *Variable Resource Allocation:* Financial allocations can exhibit substantial variability across countries and hinge on a multitude of factors, including economic conditions and political considerations. While undoubtedly

⁶ Transition Pathway for Tourism, <https://ec.europa.eu/docsroom/documents/49498/attachments/1/translations/en/renditions/native>

significant, these financial nuances may offer limited insight into the specific objectives of our analysis.

2.2. Analytical framework

Our primary data source consisted of official National Recovery and Resilience Plans (NRRPs) available in English, which were obtained from the official EU website⁷. The timeframe of data collection is between May - August 2022. We conducted a thorough *keyword search* using “Tourism” at the time of publication to identify relevant sections within these plans. We have reviewed and extracted pertinent information related to tourism policies, strategies, and planned activities from the NRRPs of all 27 EC member states. This included details on specific measures and sustainability initiatives, digitalization efforts, workforce development, infrastructure projects, and any other tourism-related components.

To compare and evaluate the content of NRRPs across different EU countries, we employed a *qualitative comparative approach*, by applying the selected three *criteria* (1) Relevance to Tourism; (2) Support for Sustainable Tourism; (3) Reform Components.

The critical evaluation process involved assessing the alignment of NRRPs with EU strategic priorities and identifying the degree of focus on tourism aligned with the European Agenda for Tourism 2030 and the Transition Pathway for Tourism. We considered the presence of detailed and justified plans or components for tourism support, as well as the emphasis on regulatory framework improvement, sustainability, and digitalization. Based on the comparative analysis and critical evaluation, we synthesized the main findings to highlight common themes and variations among the NRRPs. We identified key areas of emphasis and notable approaches taken by different EU countries towards the tourism sector and discussed their importance for Tourism development at EU level.

2.3. Limitations

The major *limitations* in our methodology are the language barriers as not all countries have published full texts in English of their NRRPs. The milestones of the targets are measured in alignment with the six policy pillars and are not sector specific or related to the general indicators for Tourism development. Another limitation is the diversity and lack of clear interlinked, cross-border or international dimensions which could enhance Tourism development of the EU as a destination.

For more prominent critical analysis in depth data is needed, which is not available for all the countries, and depending on the measures, different metrics and

⁷ Recovery and Resilience Scoreboard, https://ec.europa.eu/economy_finance/recovery-and-resilience-scoreboard/index.html?lang=en

outputs are used. We have been challenged as similar research in the field of Tourism has not been done at EU level after the launch of NRRPs. Where ambitious plans and investments for the tourism sector are present, there are gaps between the intended policies and their actual implementation. This is particularly relevant for initiatives that demand significant changes within the national socio-economic system. To bridge this gap, it is crucial for national governments and their citizens to actively embrace and take ownership of the implementation process⁸.

2.3. The place of Tourism in the NRRPs plans

The review and analysis of the NRRPs shows several main themes, present in almost all of them. There are six policy areas of European relevance structured in six pillars, which are not sector specific and are indirectly linked to the Tourism sector. The NRRPs of the EU Member States are part of the EU's response to the COVID-19 pandemic, aiming to support economic recovery and build resilience. While the NRRPs primarily address the broader EU policy areas structured within six pillars, the strategic relevance of tourism within these plans is undeniable.

Our main goal was to follow up the approach, process and justification for the plans and activities related to Tourism. At the macro level, the National Recovery and Resilience Plans (NRRPs) delineate the near-term initiatives of EU countries. This approach facilitates straightforward comparisons and assessments of their effectiveness, gauged through the outcomes in the tourism sector. The different EU countries have approached Tourism in diverse ways, which can be linked to the self-evaluation of the Tourism role in their economic development. From one side, the NRRPs are aligned with the EU's strategic priorities and address the country-specific challenges found within the European Semester framework of economic and social policy coordination. This outlines the importance of analysis of Tourism in NRRPs, which will sharply influence the future of European Tourism.

Each EU country decides the allocation of funds towards various sectors, including Tourism approaching the six major pillars. While the specific initiatives related to tourism in the NRRPs vary across Member States, some potential areas where the RRF may support the tourism sector are financial support, infrastructure development, sustainability and digitalization, and workforce training and skills development. We have not considered the financial funds allocation but the content as a policy, strategy and planned activities. The general areas that the NRRPs of EU Member States address about tourism are:

⁸ Regulation (EU) 2021/241 of the European Parliament and of the Council of 12 February 2021 establishing the Recovery and Resilience Facility <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32021R0241>

1. Sustainable tourism development, including the reducing the environmental impact of the sector, enhancing resource efficiency, and supporting the development of eco-friendly infrastructure.
2. Digitalization and innovation improving online presence, enhancing e-commerce capabilities, and fostering innovation in tourism services and experiences. Development of new digital marketing models is aiming to boost both domestic and international tourism.
3. Skills development and employment supporting the tourism workforce through initiatives like training programs, upskilling and reskilling opportunities, and measures to address the impact of the crisis on employment in the sector and new emerging business models.
4. Infrastructure and destination management related to the allocation of resources to improve tourism-related infrastructure, including transportation networks, accommodation facilities, and visitor attractions.
5. The destination management strategies at distinct levels (national, regional, local) are outlined to ensure sustainable growth and competitiveness.
6. Diversification of tourism products aiming to reduce dependency on specific segments, such as seasonal or mass tourism, by promoting cultural, rural, nature-based, and other niche tourism products.

2.4. Interconnections between NRRPs, European Agenda for Tourism 2030 and Transition Pathway for Tourism

Considering the European Agenda for Tourism 2030⁹ and the Transition Pathway for Tourism¹⁰ we have found the following interconnections:

- Digitalization and Innovation: the adoption of digital technologies to enhance the visitor experience and improve tourism services. The NRRPs of various countries, such as Greece, Croatia, Italy, Spain, Portugal, and Finland, include significant investments in the digitalization of the tourism sector. They plan to develop digital tools, online platforms, mobile applications, and AI-based systems to provide tourists with better information and services.
- Sustainability and Green Transition: the promotion of eco-friendly practices, the use of renewable energy sources, and the reduction of the environmental impact of tourism. Several NRRPs, including those of Spain, Greece, and Slovenia, outline plans for sustainability in tourism. They focus on the development of sustainable tourism strategies, the implementation of environmental

⁹ European Agenda for Tourism, <https://data.consilium.europa.eu/doc/document/ST-15441-2022-INIT/en/pdf>.

¹⁰ Transition Pathway for Tourism, <https://ec.europa.eu/docsroom/documents/49498/attachments/1/translations/en/renditions/native>.

technologies, and the promotion of green technologies and practices in tourism destinations.

- Diversification of Tourism Products: the reduction of seasonality and attracting a wider range of visitors highlight the importance of promoting cultural, heritage, and nature-based tourism experiences. Greece's NRRP, for example, emphasizes the development of various forms of tourism, including spa, wine, gastronomic, diving, and mountain tourism, to reduce dependence on summer tourism and diversify tourism products. Similar interventions are included in the NRRPs of Romania, Spain, Italy, Slovenia, etc.
- Destination Management and Marketing to enhance the competitiveness of European destinations. Several NRRPs, such as Greece's plan, include projects related to destination management and the creation of Destination Management and Marketing Organizations (DMMOs) to improve the marketing and development of tourism destinations.
- Reskilling and Training supporting a high-quality visitor experience. NRRPs across various countries, including Greece and Croatia, include investments in reskilling and upskilling programs for tourism personnel, with a focus on acquiring digital skills and improving overall competencies.

Applying our three criteria - (1) Relevance to Tourism, (2) Support for Sustainable Tourism and (3) Reform components, we have summarized the interconnection between NRRPs and European Agenda for Tourism and Transition Pathway for Tourism (Table 1).

Table 1. Tourism in NRRPs and EU landmark documents

Policy pillar NRRP	Matching the criteria	NRRPs content	European Agenda for Tourism 2030	Transition Pathway for Tourism
Green Transition	1, 2, 3	Plans for sustainability in tourism. Investment in renewable energy systems, improvement of energy efficiency, and other green initiatives contributing to the green transition.	Digitalization and Innovation Sustainability and Green Transition	Green and Digital transition: Synergies with other ecosystems Meeting the demand for more sustainable tourism
Digital Transformation	1, 3	Significant investments in digitalization of the tourism sector. Creation of online platforms, mobile applications, digital maps, and AI-based tourism information systems, all contributing to the digital transformation of tourism.	Digitalization and Innovation Destination Management and Marketing Skills and support for transition	Green and Digital transition: Digitalization of tourism services Infrastructure needs to achieve the twin transition

Smart, Sustainable, and Inclusive Growth	1, 2, 3	Support for sustainable tourism development. Efforts to diversify tourism products, promote eco-friendly practices, and invest in cultural heritage.	Sustainability and Green Transition Destination Management and Marketing Diversification of Tourism Products Resilience and inclusion	Green and Digital transition: R&I and technologies Barriers to taking up new solutions Resilience: Social dimension
Social & Territorial Cohesion	1, 2, 3	Efforts to support social and territorial cohesion are present in some NRRPs.	Diversification of Tourism Products Resilience and inclusion	Green and Digital transition Digitalisation of tourism services Infrastructure needs to achieve the twin transition
Health	3	Not explicitly related to Tourism, but addressed in NRRPs, especially considering the impact of the COVID-19 pandemic. Sanitary and hygiene protocols, crisis management plans, and other health-related measures are included.	n/a	Enabling policy framework and governance
Economic, Social, and Institutional Resilience:	3	Support of the economic recovery of the tourism sector after the pandemic. This includes financial support, assistance programs, and financial aid to retain jobs and overcome liquidity challenges. Investment in workforce training and skills development are also included, contributing to the resilience of the tourism sector.	Reskilling and Training Resilience and inclusion Skills and support for transition	Green and Digital transition Skills needs Resilience Skills and workforce

Source: authors' representation

Overall, we can summarize that most of the NRRPs align with the priorities and aims in the European Agenda for Tourism 2030. The plans reflect the EU's commitment to fostering sustainable, innovative, and diversified tourism while enhancing the skills and competitiveness of the sector.

4. Main findings from the analysis and comparison of the NRRPs

The review of the NRRPs (European Commission, 2021a) shows several main themes, present in almost all of them and corresponding to the priorities and aims for the development of European tourism, featured in landmark EU documents, such as the Transition Pathway for Tourism and the European Agenda for Tourism 2030, namely - digital and green transition, sustainability, tourism product development and diversification, and education. The analysis of NRRPs in accordance to the 3 defined criteria: (1) *Relevance to Tourism*; (2) *Support for Sustainable Tourism*; (3) *Reform Components* are presented as follows:

Table 2. EC member states NRRPs and relevance to Tourism*

Country	Pillar in NRRP	Investments/measures/reforms:	Criteria		
			1	2	3
Spain ¹¹	Lever Policy 5 'Modernisation and digitalisation of industry and SMEs, entrepreneurship and business environment, recovery and transformation of tourism and other strategic sectors'	<p>Component 14: Plan for the modernization and competitiveness of the tourism sector'. It has 4 priority action areas:</p> <ol style="list-style-type: none"> 1. Transformation of the tourism model towards sustainability; 2. Program for digitization of destinations and the tourism sector; 3. Tourism sustainability strategies for the territories outside the peninsula; 4. Special actions in the field of competitiveness. <ul style="list-style-type: none"> - a new Sustainable Tourism Strategy for Spain until 2030 and Plans for the Sustainability of Tourism in Destinations - the measures envisaged here are the implementation of environmental technologies, renewable energy systems, improvement of energy efficiency, construction of optical infrastructure, introduction of 5GNSA and 5GSA services for tourists, online tourism websites and platforms, modernization/construction of (cultural and historical) tourist sites, creation of new products, preparation of crisis management plans at the destination level, sanitary and hygiene protocols, etc. - Reform in the reform by the State Financial Fund for the Competitiveness of Tourism (FOCIT), which will finance projects for energy efficiency, green transition, etc.; - Social Sustainability Plans for the Tourism Sector; - Integrated system for tourism sustainability; - Plan for the digital transformation of tourist destinations - Intelligent Destination Platform, "industrial data space" by leveraging AI and Big Data, etc.; - Development of tourism products and modernization of the tourism ecosystem; - Special actions in the field of competitiveness - Development of tourism products and modernization of the tourism ecosystem; Financing of projects for sustainable maintenance and rehabilitation of historical heritage; Financing projects in the field of circular economy, etc. 	Y	Y	Y

¹¹ National Recovery and Resilience Plan of Spain. (2021). Component 14. <https://www.lamoncloa.gob.es/temas/fondos-recuperacion/Documents/16062021-Componente14.pdf>

Portugal ¹²	Resilience, climate transition, and digital transition;	<p>A separate Action Plan was adopted: “Reactivate Tourism. Build the Future”, which describes the reforms and goals in the sector until 2027, which will also be financed by means of the Portuguese NRRP. The Action Plan corresponds to Portugal’s 2030 Government Strategy and the National Tourism Development Strategy. The plan focuses on four pillars of action - (1) Support for tourism businesses; (2) Safety; (3) Creating business opportunities; and (4) Building the future of the sector. All of them corresponding to three strategic focus areas of the NRRP, namely:</p> <ul style="list-style-type: none"> - Public guarantee for debt refinancing/rescheduling before COVID-19; - Guaranteed line of credit to finance the needs of the tourism sector; - An integrated network to support entrepreneurs; - Attracting international events to Portugal programme; - Promoting sustainable mobility programme; - International campaign to promote Destination Portugal; - New portal Visit Portugal; - Tourist Bonds; - Program for access of SMEs to the capital markets; - Upgrade of the Knowledge Centers and Specialized Training Programs; - Training Program for Immigrants and People in Severe Financial Difficulties; A program for attracting talents; Upgrade Tomorrow - Improving digital skills program, etc. 	Y Y Y
Greece ¹³	Pillar ‘Green Transition’ Pillar ‘Digital Transformation’ Pillar ‘Employment, skills and social cohesion’ Pillar ‘Private investments and transformation of the economy’	<ul style="list-style-type: none"> - Digital Transformation of the Greek National Tourism Organization - Digital Tourist Map; Creation of a digital repository of the cultural assets of Greece; - Development of an innovative tourist information system; - Tourists register e-MHTE; - Establishment of destination management and marketing organizations (DMMOs); - Mountain tourism and Health, wellness, accessible and diving tourism projects; - Modernization of ports project - National Strategic Plan for the development of tourist ports will be developed; - System for interconnection of agri-food, gastronomy and tourism (AGTI); - <u>Re-skilling and up-skilling in tourism, etc;</u> 	Y Y Y
Cyprus ¹⁴	Policy axis: ‘Labor market, social protection, education and human capital’	<ul style="list-style-type: none"> - Financing the renovation of accommodation in rural, mountainous and remote areas to modernize and increase the competitiveness of the tourist product; - Adaptation of accommodation by including medical facilities for assisted living, with the aim of developing health, wellness and medical tourism; - Promoting the circular economy in hotels, etc. 	Y Y Y

¹² Portugal’s Reactivate Tourism. Build the Future Action Plan. (2020). <http://www.turismodeportugal.pt/SiteCollectionDocuments/estrategia/reactivate-tourism-build-the-future-action-plan.pdf>

¹³ National Recovery and Resilience Plan of Greece. (2021). https://greece20.gov.gr/wp-content/uploads/2021/07/NRRP_Greece_2_0_English.pdf

¹⁴ National Recovery and Resilience Plan of Cyprus. (2021). [http://www.cyprus-tomorrow.gov.cy/cypreresidency/kyprostoavrio.nsf/all/B37B4D3AC1DB73B6C22586DA00421E05/\\$file/Cyprus%20RRP%20For%20Upload%2020052021.pdf?openelement](http://www.cyprus-tomorrow.gov.cy/cypreresidency/kyprostoavrio.nsf/all/B37B4D3AC1DB73B6C22586DA00421E05/$file/Cyprus%20RRP%20For%20Upload%2020052021.pdf?openelement)

Malta ¹⁵	Area 'Enhancing <i>quality education</i> and fostering <i>socio-economic sustainability</i> '	- Setting up a Center for excellence in professional education in the field of tourism, and in particular for the restaurant and hotel industry (ITS Campus).	Y	N	N
Romania ¹⁶	Pillar ' <i>Smart, sustainable, and inclusive growth</i> '	- A network of regional destination management organizations (DMOs) for the economic and social development of rural and undeveloped areas in the country; - Construction of a national bicycle network, incl. EuroVelo routes; - Modernization and construction of museums and monuments, etc.	Y	Y	Y
Croatia ¹⁷	Component 'Economy' Component 'Public Administration, Judiciary and State Property' Component 'Healthcare'	- Development of sustainable, innovative and prepared tourism, incl. an updated Strategy for Sustainable Development of Tourism until 2030 (incl. a national action plan and strategic environmental impact assessment), a new Law on Tourism, so as to create conditions for stimulating innovation and investment, RES, digitization, diversification of tourism products; - A new IT tool for data collection that builds on the existing e-tourism system; - Regional diversification and specialization of Croatian tourism through investments in the development of tourism products with high added value - through grants for investments in the construction of new public infrastructure (swimming pools, spas and congress centres, information and visitor centers, themed trails, etc.); - Strengthening the sustainability and promoting the green and digital transition of entrepreneurs in the tourism sector; - Strengthening the capacity of the system for sustainable and prepared tourism - investment in increasing the skills of personnel in the sector. Special educational programs will be created so that tourism personnel acquire new skills in ICT, innovation, entrepreneurship, marketing, communication, green and digital skills, destination management, etc.	Y	Y	Y
Italy ¹⁸	Mission 'Digitalisation, innovation, competitiveness, culture and tourism'	- Integrated funds for tourism business competitiveness; - Digital Tourism Hub; new platform of data analysis systems; new guidelines for SMEs to introduce digital technologies; upgrade of the Italia.it portal, etc.	Y	Y	Y
Slovenia ¹⁹	Cluster ' <i>Smart, sustainable and inclusive growth</i> '	- Adoption of a Tourism Recovery Plan in Slovenia for 2020-2023; - Adoption of a Decree to Promote the Development of Tourism; - Adoption of a Strategy for Digital Transformation of Tourism;	Y	Y	Y

¹⁵ National Recovery and Resilience Plan of Malta. (2021) <https://eufunds.gov.mt/en/Operational%20Programmes/Documents/Malta%27s%20Recovery%20%20Resilience%20Plan%20-%20July%202021.pdf>

¹⁶ National Recovery and Resilience Plan of Romania. Part II, Component 11: Tourism and Culture. (2021). <https://mfe.gov.ro/pnrr/>

¹⁷ National Recovery and Resilience Plan of Croatia. (2021). https://ec.europa.eu/info/files/recovery-and-resilience-plan-croatia_en

¹⁸ National Recovery and Resilience Plan of Italy. (2021). <https://www.governo.it/sites/governo.it/files/PNRR.pdf>

¹⁹ Annex to the Council Implementing Decision on the approval of the recovery and resilience plan for Slovenia. (2021). <https://data.consilium.europa.eu/doc/document/ST-10612-2021-ADD-1/en/pdf>

		<ul style="list-style-type: none"> - Adoption of the Strategy for Sustainable Growth of Slovenian Tourism for 2022-2028; - Preparation of four master plans for tourist macro-destinations until 2030; - Update of the so-called Green scheme of Slovenian Tourism. 			
Slovakia ²⁰	Priority 'Green economy'	- Development of eco-tourism in the Muránska planina National Park and the National Park of Poloniny.	Y	N	N
Finland ²¹	Pillar 'Green Transition'	<ul style="list-style-type: none"> - Digital carbon footprint calculator for tourism services; - Programs financing innovations, whose focus should be the commercialization of innovations in the tourism industry; projects in the field of green and digital transition; sustainable and virtual tourism projects; - Visit Finland Data Hub will be developed; - Visitfinland.com portal will be updated. 	Y	Y	N
Belgium ²²	Axis 'Digital Transformation'	- Digitalization of the tourism sector in Wallonia.	Y	N	N
France ²³	Component 'Digitalisation of the State, territories, businesses and support to the cultural sector'	- Measures aimed at digitalization and supporting cultural heritage to renovate historic monuments, make them more sustainable and promote local tourism eco-systems.	Y	N	N

Note: There are no specific components/investments/measures specifically targeting the tourism sector in the NRRPs of Germany, Austria, the Netherlands, Czech Republic, Poland, Ireland, Sweden, Denmark, Latvia, Lithuania, Estonia, Hungary, Bulgaria, Luxembourg.

Source: authors' representation

First, from the analysis of the NRRPs, there are countries that put special *Strategic Focus* on Tourism, such as Spain, Greece, Croatia, Cyprus, Romania, Portugal, Slovenia, etc. The Relevant to Tourism a criteria, distinguishes the NRRPs with separate, detailed and well justified (through development scenarios, expected goals, performance indicators, etc.) plans or so-called components/investments to support and develop tourism.

Second, in the plans of all countries for which the sector is of decisive importance, *improvement of the regulatory framework* is foreseen with the aim of modernization of the sector, introduction of sustainable business models, realization of projects for digital and green transition and increased innovation uptake. Part of NRRPs are *new strategies* matching the criteria for *Reform components and Support for the sustainable development of tourism*, which are part of NRRPs of Spain, Croatia, Romania, Slovenia.

²⁰ National Recovery and Resilience Plan of Slovakia. (2021). <https://www.planobnovy.sk/site/assets/files/1019/kompletny-plan-obnovy.pdf>

²¹ National Recovery and Resilience Plan of Finland. (2021). https://julkaisut.valtioneuvosto.fi/bitstream/handle/10024/163176/VN_2021_52.pdf?sequence=4&isAllowed=y

²² National Recovery and Resilience Plan of Belgium. (2021). <https://nextgenbelgium.be/>

²³ Annex to the Council Implementing Decision on the approval of the recovery and resilience plan for France. (2021). <https://data.consilium.europa.eu/doc/document/ST-10162-2021-ADD-1/bg/pdf>

Third, in all the NRRPs, there are various programs and reforms financing digitalization. In the countries whose NRRPs plans do not have specific investments for tourism, the sector can also benefit from programs in the field of digitalization - e.g. in Ireland through the “*Digital Transformation of Enterprises*” program, in Lithuania through the “*Financial Instruments for Digital Innovation*” investment, in Latvia through the “*Financial Instruments to Facilitate the Digital Transformation of Economic Operators*” investment, in Estonia through the “*Digital Transformation of Enterprises*” investment, in Belgium²⁴ through “*Digitalisation of the Tourism Sector in Wallonia*” investment. The same applies to Austria (Bundeskanzleramt Österreich²⁵; Council of the European Union, 2021), Denmark, Sweden, Germany, Bulgaria (Government of Bulgaria, n.d.), Poland, etc.

Fourth, a large part of the investments in the NRRPs are for the green transition of the sector - almost all plans have programs for energy renovation of buildings and the introduction of eco practices, RES energy sources, etc.

Fifth, a key transformative investment for the sector, included universally in all NRRPs, is reskilling, upskilling, and training. Malta will set up a Center of Excellence in Vocational Education in Tourism, Greece is introducing a separate program that will focus not only on those employed in the sector, but also on the long-term unemployed as well as employees whose contract has been ended due to COVID-19. Croatia also has a separate investment in its plan “Strengthening the capacity of the system for sustainable and prepared tourism”, which is for the retraining of tourism personnel. Portugal plans to implement multiple programs - 12 knowledge centres and specialized training programs, migrant training program, talent attraction, Digital Jobs 2025, etc. It is important to note that all the education initiatives in this regard have digital skills as their main focus. Those employed in the sector in countries where there are no separate investments for tourism can take part in similar programs that target the entire population and all economic sectors - this is the case in France, Austria, Germany, France, Estonia, Latvia, Poland, Sweden, Finland, Luxembourg, Bulgaria, etc.

Sixth, the *diversification of tourism products* and the development of new niches with potential is present in all the NRRPs of the established tourist destinations. In Greece, for example, through the ‘Tourism Development’ investment, emphasis is placed on the development of winter, spa, wine, gastronomy, diving tourism, among others, so as the sector overcomes the dependence on summer tourism. Similarly, in Croatia, for the same reason, investments will be directed toward the development of alternative forms of tourism after a detailed study of the tourism resources in the country - emphasis is placed on health, rural, natural, cultural, natural and sports tourism. In Romania, investments will be made in rural,

²⁴ Next gen Belgique. <https://nextgenbelgium.be/fr/>

²⁵ Bundeskanzleramt Österreich. Der EU-Aufbauplan. <https://www.bundeskanzleramt.gv.at/eu-aufbauplan/der-eu-aufbauplan.html>

cultural and cycling tourism. Portugal will develop wine, gastronomic, cycling, even literary tourism. In Cyprus, the priority will be cultural, rural, medical tourism, etc. In these countries, investments are also planned for the construction/modernization of tourist infrastructure - ski resorts, ports (Greece), hotels (Greece, Croatia, Cyprus, Spain, Portugal), information centres (Greece, Italy, Cyprus), etc.

Seventh, almost all countries' plans include multiple financing mechanisms. As expected, they are the most numerous and diverse of those countries for which the sector is of key economic importance and where it is most affected. For example, Spain is reforming the State Financial Fund for Tourism Competitiveness, and Italy is creating competitiveness funds for financing tourism recovery, etc. In Portugal, a Program facilitating the access of SMEs to capital markets will be created, as well as tourism bonds, Business Mergers Fund, a Fund for Internationalization of Tourism Enterprises, Pre-Covid-19 Debt Refinancing/Rescheduling Program, etc.

Table 3. Summary of main findings

Activity	Activities, measures	Countries	Transition Pathway for Tourism
Strategic Focus	Separate detailed plans and investments to support and develop tourism, aligned with EU priorities	Spain, Portugal, Greece, Cyprus, Malta, Italy, Croatia, Romania, Slovenia, Finland, France, Belgium, Slovakia,	n/a
Digitalization	Investments in digital tools and platforms to enhance the tourist experience, from digital tourist maps to online booking systems and information portals	Finland, Greece, Croatia, Italy, Spain, Portugal, Finland	Green and Digital Transition
Green Transition	Hotels and accommodations are often targeted for energy renovations.	Bulgaria, Greece, Croatia, Sweden, Latvia, Spain, Italy, Estonia, Finland, Cyprus, Poland	Green and Digital Transition
Workforce Training	Upskilling and reskilling of the tourism workforce with a specific emphasis on developing digital skills. These programs aim to address unemployment and improve the competitiveness of the tourism sector.	Specific for Tourism: Malta, Greece, Croatia, Portugal, Ireland For all: France, Austria, Germany, France, Estonia, Latvia, Poland, Sweden, Finland, Luxembourg, Bulgaria	Green and Digital Transition - Skills needs Resilience - Skill and workforce
Product Diversification	Exploration of niche markets such as winter sports, spa, gastronomy, and cultural tourism as ways to reduce	Greece, Romania, Croatia, Portugal, Cyprus	Green and Digital Transition

	dependence on seasonal tourism		
Regional Development	Many NRRPs include initiatives to support regional development and destination management organizations. These efforts seek to enhance local tourism infrastructure and promote sustainable growth.	Greece, Finland, Portugal, Slovenia, Croatia, Romania	Resilience - Social dimension Green and Digital Transition - Infrastructure needs to achieve twin transition
Collaboration	Public-private collaboration is a common thread, with various programs encouraging partnerships and innovation in the tourism sector.	Spain, Portugal	Regulation and public governance

Source: authors' representation

5. Discussions

The analysis of the approach and activities included are extremely difficult to compare, as they are running in different national contexts, starting from different levels of tourism development. The diverse types of recovery and resilience are not analysed in detail. It is difficult to find the successful models, policies and measures (indicators) to evaluate and effectiveness of those efforts. Moreover, the Tourism is complex, linked to other sectors of economy and globalization. The NRRPs analysis is limited to the EU countries and funds allocated by EU, apart from national efforts and policies. Nevertheless, it outlines the different policy approaches and importance of Tourism in EU countries.

Evaluating Implementation Challenges and Assessing the Actual Impact by comparing the implementation of National Recovery and Resilience Plans (NRRPs) in the Tourism sector to the outlined goals could provide valuable insights into the effectiveness of measures and the overall development of the tourism industry. Additionally, assessing the real-world impact of these plans on the tourism sector's recovery, resilience, and sustainability is crucial (European Commission, 2021b). This involves examining whether the proposed measures lead to tangible improvements in key indicators such as tourist arrivals, revenue, job creation, and sustainability metrics. Understanding the gap between policy design and implementation effectiveness would provide valuable insights for policymakers and stakeholders in the tourism industry.

Another limitation is the lack of well-defined metrics and indicators for evaluating the effectiveness of EU countries' efforts in the tourism sector through their National Recovery and Resilience Plans (NRRPs). The NRRPs include a different set of indicators from the generally applied in Tourism. For quantitative and data-driven assessment of the effectiveness of NRRPs in the tourism sector the

indicators could include, but are not limited to: *tourist arrival and revenue data*, before and after the implementation of NRRPs; *employment and job retention*; *environmental sustainability* assessed by the reduction in the environmental footprint of tourism activities, such as carbon emissions, waste generation, and water usage; *digitalization metrics*; *monitoring the implementation of sustainability initiatives*; *the effect from diversification of tourism products* and the reduction of seasonality in tourism; *reskilling and training impact*, etc.

Further research could be extended by conducting qualitative analysis and benchmarking to evaluate and have a complete picture of the goals achieved. This will enrich the comparative analysis and offer a deeper understanding of how different strategies impact the tourism sector and contribute to the recovery and resilience of European tourism.

Conclusions

The NRRPs are a chance for accelerated economic recovery and strategic transformation of the tourism industry so that it is more resilient, more competitive and better prepared to meet current and future challenges.

The review of the NRRPs shows that the tourism industry is extremely important for the European economy, and for many EU Member States the sector is strategic. Tourism is among the sectors generating the fastest economic growth and jobs. It is also among the main mechanisms for building and promoting Europe's reputation and image around the world as a space of development, security and well-being. Tourism is among the EU economic sectors worst hit by the pandemic, which is still unable to recover. For many countries whose economies depend significantly on it, the sector crisis had an even larger-scale negative impact. All countries that are major international tourism destinations and for which the sector is of primary importance have separate, detailed plans and/or programs specifically targeting tourism and are backed by significant budgets. The research shows that the policies and reforms laid down in the plans of these countries not only guarantee recovery, but they also fully correspond to the EU priorities in tourism, enshrined in the new EU documents, such as the Transition pathway for tourism and European Agenda for Tourism 2030.

The analysis of the NRRPs shows that the tourism sector can benefit from many and varied programs and investments to implement policies for digital and green transition, sustainability, innovation, education, etc. These plans do not only address the economic recovery of the sector in the short term until 2026, until when they will be implemented, the NRRPs envisage such policies that will completely transform the national tourism sectors in the long term - e.g. all the 'tourism countries' will invest in the development of entirely new tourism niches, digitalization, infrastructure and policies, the development and exploitation of which

will generate income and employment for years to come. It could be said that the planned investments are a mini-Marshall Plan for tourism in these countries.

There is no clear distinction in the inclusion of Tourism in NRRPs vary between well-established tourist destinations as Spain, Greece versus emerging markets as Slovenia for example. The new strategic documents at the EU level in the field of tourism, namely the European Agenda for Tourism 2030 and the Transition Pathway for Tourism feature the priority areas we found present in all the National Recovery and Resilience Plans - sustainability, digitalization, green transition, skills, resilience and enabling policy framework. Now is the time to follow how the EU tourism priorities will be realized, financially and institutionally supported. It is even more important and a subject of research to what kind of change in the tourism industries of the EU Member States will lead the tourism-related reforms, investments and projects laid down in their national plans.

Most important recommendations enhancing the comprehensiveness and effectiveness of NRRPs related to Tourism consider receiving the necessary political recognition within the EU. This means the search of increases synergies and interconnections between NRRPs and Tourism-related initiatives as part of a broader vision for sustainable development. Stronger attention to Reform Components, especially in countries, grappling with structural issues. This applies also to strengthening the EU Dimension, enhancing regional and cross-border cooperation in the tourism sector. Tourism would benefit also from mainstream support for cohesion, related to territorial, social impact assessments and well-being measurement. For monitoring and evaluation of effectiveness of measures, adequate target plans and tourism-related indicators should be included together with transparency and stakeholder involvement and dialogue.

These recommendations can be applied to enhance the effectiveness of NRRPs related to tourism, making them more comprehensive, coherent, and aligned with EU objectives while promoting sustainable tourism development.

In conclusion, NRRPs present a unique opportunity to drive economic recovery and strategic transformation in the tourism industry, fostering resilience, competitiveness, and sustainability. The EU's recognition of tourism's significance is evident, and its alignment with broader EU priorities positions it as a pivotal sector for Europe's recovery and future growth. Recommendations emphasize enhancing the effectiveness and coherence of NRRPs, strengthening the EU dimension, and promoting sustainable tourism development while fostering transparency and stakeholder engagement.

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