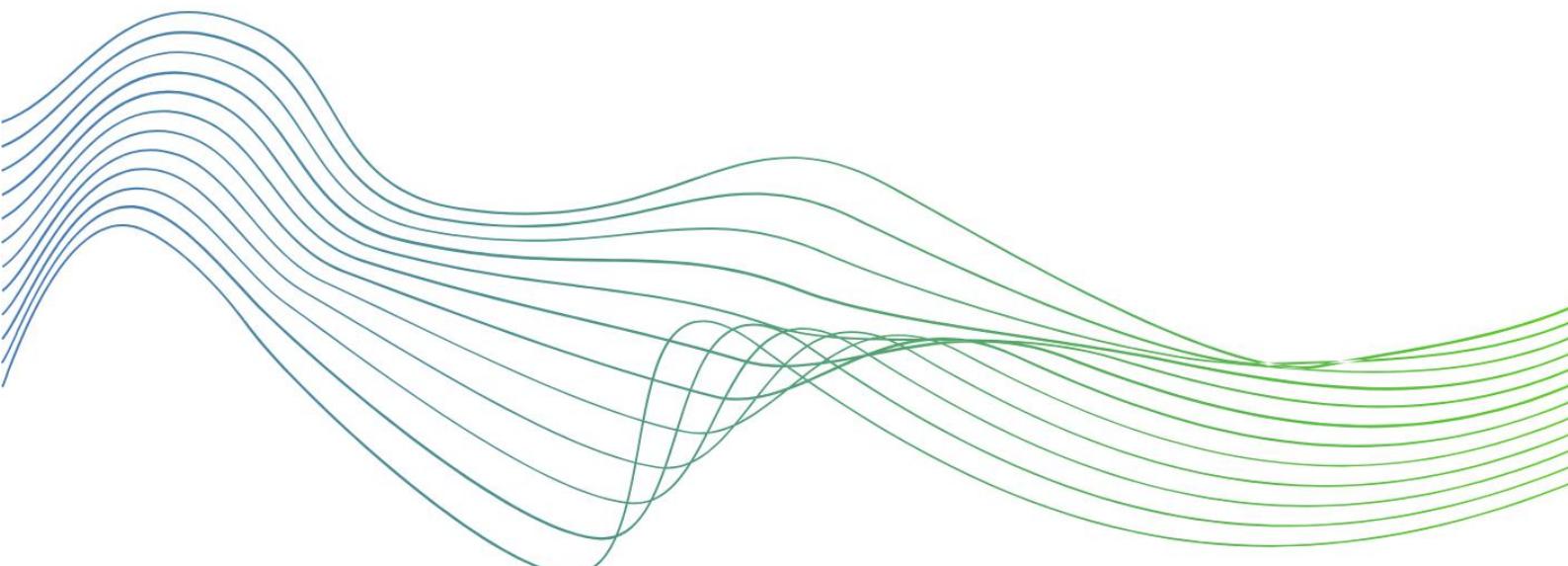


POLICY REPORT ON LABOUR MARKET SKILLS FOR THE HOSPITALITY/ TOURISM INDUSTRIES

PROJECT NUMBER: 101144003



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Executive summary

Main Findings from the Seven Countries

The analysis of the seven National Policy Reports, Task 6.1 of the project GreenHost – Project 101144003 – ERASMUS-EDU-2023-PEX-COVE, highlights the socio-economic weight of tourism and hospitality in all partner countries, but also reveals significant structural weaknesses:

- **Bulgaria:** Tourism represents 6.9% of GDP and depends heavily on seasonal and foreign workers. Digitalisation remains limited, and the sector is often overlooked in national strategies.
- **Cyprus:** Tourism represents around 19 % of GDP and relies heavily on third-country nationals (43% of the workforce). Clear skills gaps exist in green and digital skills, compounded by low salaries and high turnover rates.
- **Greece:** Tourism contributes 12.7% to GDP (€30.2 billion, 2024). The analysis reveals four major challenges: First, **digital transformation gaps** leave many SMEs unable to adopt AI, data analytics, or smart tourism platforms. Second, **green and sustainable skills** are limited, with staff rarely trained in environmental footprint monitoring or circular economy practices, despite rising consumer demand. Third, **soft skills and social innovation** remain underdeveloped in vocational curricula, undermining service quality and employee resilience. Finally, **labour market attractiveness** is hampered by low wages, seasonal contracts, and high turnover, discouraging young workers and leading to 53,000 vacancies in 2023.
- **Slovenia:** Tourism contributes 5.2% of GDP (2023), with strong branding in sustainable tourism ("Slovenia Green"). However, SMEs are under-digitalised, and the sector remains vulnerable to seasonality and overtourism.
- **Portugal:** Tourism accounted for 19.6% of GDP in 2023 (a record year, with 30 million guests and 77 million overnight stays). Sustainability challenges concern environmental pressures and rising housing costs.
- **Spain:** Tourism contributes 12.3% of GDP and employs 2.94 million people (13.4% of total jobs). Yet, 41.6% of workers are in precarious conditions, with particularly high rates among women and young people.
- **Italy:** Tourism represents 13% of GDP and employs 1.3 million workers. Main issues include seasonality, low wages, and limited adoption of green certifications and digital solutions.

Common Challenges and National Differences

The cross-country analysis identifies **six recurring challenges**:

1. **Labour shortages and high seasonality:** Persistent labour shortages linked to seasonality and reliance on temporary staff
2. **Job precarity and low attractiveness:** Low pay, temporary contracts, and demanding conditions reduce the attractiveness of tourism jobs, especially for young and local workers.
3. **Digital and green skills gaps:** slow adoption of smart tourism tools, insufficient green and digital skills competencies.
4. **Mismatch between training and market needs:** Misalignment between training systems and labour market needs limits the effectiveness of education and VET pathways.
5. **Dependence on migrant and third-country workers:** lack of adequate integration policies.
6. **Social and environmental sustainability challenges:** overtourism, housing pressures, high energy and water consumption

National differences are also visible:

- Southern countries (Spain, Italy, Greece, Cyprus, Portugal) show higher dependence on tourism, stronger seasonality, and more acute precarity.
- Slovenia and Bulgaria face similar challenges but on a smaller scale, with more urgent needs for digitalisation. In the case of Slovenia, the need does not lie in strategic planning, as frameworks such as the Slovenian Tourism Strategy are already in place. The main challenge concerns the effective implementation and monitoring of these strategies.
- Innovative practices emerge nationally (e.g. reskilling vouchers in Greece, Destination Watch in Portugal, Slovenia Green brand, Digital Tourism Hub in Italy), showing potential for transferability.

Key EU-Level Policy Recommendations

From the synthesis of the seven national reports, a set of shared European recommendations has been developed:

1. **Align education and training with industry needs**
 - Introduce EU-wide standards for digital, green, and soft skills in VET and higher education curricula.
 - Promote stronger cooperation between enterprises and training providers.



2. Scale up reskilling and upskilling programmes

- Expand initiatives such as the Greek **voucher system** or Cypriot training incentives at EU level.
- Target seasonal workers and SMEs with flexible learning pathways.

3. Support sustainable business transformation

- Encourage adoption of **eco-certifications** and sustainability monitoring systems (e.g. Portugal's Destination Watch, Slovenia Green).
- Provide financial incentives for SMEs to invest in sustainable and digital practices.

4. Improve job quality and attractiveness

- Develop EU guidelines to address precarity in the sector, ensuring fair contracts and adequate wages.
- Encourage policies that make the sector more attractive for youth and women.

5. Strengthen data collection and monitoring

- Establish a European Tourism Skills Observatory, building on national practices in Italy and Portugal, to systematically monitor labour market trends, skills demand, and sustainability indicators.

1. The Project

The GreenHost project

The project GreenHost – Project 101144003 – ERASMUS-EDU-2023-PEX-COVE, funded under the Erasmus+ programme (ERASMUS-EDU-2023-PEX-COVE), has a total duration of 48 months (2024–2028). It benefits from EU co-funding dedicated to the development of Centres of Vocational Excellence (CoVE) in the tourism and hospitality management sector.

The project brings together a transnational partnership composed of universities, vocational training providers, chambers of commerce, industry associations, and organisations active in sustainable tourism from seven European countries. The common objective is to strengthen the quality and resilience of human capital in tourism, equipping the workforce with the skills required by the green and digital transition, while contributing to the EU's Green Deal and the Pact for Skills.

The Project Partners are:

- **Greece:** The University of Macedonia (UOM), Technical Institute of Heraklion Chamber (TIHC), The Chamber of Halkidiki, and OECON Group.
- **Bulgaria:** Ministry of Tourism of Bulgaria (MTBG), Euro-Alliance Ltd. (EA), Plovdiv Chamber of Commerce and Industry (PCCI).
- **Cyprus:** Nicosia Tourism Board (NTB), Magnetar Ltd. (MAG), Frederick University.
- **Italy:** AITR – Associazione Italiana Turismo Responsabile, CSL La Cremeria.
- **Portugal:** The Organization of Tourism of Porto and Northern Portugal (TPNP) and The Instituto Politécnico do Porto (IPP).
- **Spain:** CETT – Barcelona School of Tourism, Hospitality and Gastronomy, Aethnic – Ethical Tourism Association of Catalonia, Cambra de Comerç de Girona (CCIG).
- **Slovenia:** Maribor Tourist Board (MTB), SŠGT – Secondary School of Gastronomy and Tourism, Maribor.

General Objectives of GreenHost

- Integrate green and digital practices into the hospitality management curriculum, helping students, professionals, and trainers to upskill and reskill in line with sustainability and environmental footprint methods.



- Establish collaboration between VET institutions (ISCED levels 3–8) and industry representatives to promote a common strategy for the future of tourism professionals.
- Develop a functional online networking platform that facilitates cooperation, apprenticeships, and learner mobilities among partners and stakeholders.
- Enhance the attractiveness and sustainability of the tourism and hospitality sector by addressing skill shortages and aligning with the European Green Deal and Paris Climate Agreement objectives.
- Create interconnected Centres of Vocational Excellence (CoVEs) across participating countries (Greece, Bulgaria, Cyprus, Italy, Spain, Slovenia, Portugal) to foster innovation, regional development, and social inclusion through green and digital transformation.
- Support policy reform for VET modernization by promoting practical methods for sustainability, digitalization, and entrepreneurship in hospitality management.

Project Structure and Work Packages:

GreenHost is organised into seven Work Packages (WPs), each delivering specific outputs:

WP1 – Project Management and Coordination

WP2 – Research & Innovation

Focuses on identifying the skills gaps and labour market challenges in the tourism and hospitality sector across partner countries. It produced the National Policy Reports that form one of the evidence bases for Deliverable 6.1. WP2 ensures that all subsequent actions are rooted in concrete research findings.

WP3 – Online Transnational Cooperation Platform

Develops a transnational cooperation hub that brings together VET providers, universities, enterprises, and policymakers. The platform serves as a space for knowledge exchange, best practices, and collaboration, ensuring that solutions are co-created with industry and relevant stakeholders.

WP4 – Teaching and Learning

Uses the evidence from WP2 and WP3 to design innovative curricula and training modules. These include digital skills, green skills sustainability competencies, and managerial and social innovation skills, aiming to close the mismatch between training provision and industry needs. WP4 ensures that VET and higher education institutions can deliver future-proof education and training pathways.



WP5 – Mobility & Industry Engagement

WP5 is focused on mobility of apprenticeships at the national level and study visits at the international level, which can generate engagement and long-term impact over the project's target groups and stakeholders. To achieve this, WP5 makes use of the functions of WP3's online platform to set up national and international networks between industry representatives and VET providers.

WP6 – Support for Policy Reform and Recognition

Translates the project's findings into policy recommendations at national and EU levels. It also coordinates dissemination activities to ensure that results reach the relevant target groups, including policymakers, governments, social partners, enterprises, and training institutions. Deliverable 6.1, the Policy Report on Labour Market Skills, is the first major output of WP6

WP7 – Dissemination and Exploitation of Results

It aims to ensure the visibility, adoption, and long-term sustainability of the GreenHost results. It includes communication activities such as the project website, social media outreach, newsletters, and the production of dissemination materials. Each partner will host multiplier events featuring student competitions that reward the most innovative and green projects. WP7 also supports the use and promotion of the policy reports developed under WP6 and fosters the creation of lasting European cooperation networks. Through these actions, WP7 guarantees that the project's impact and best practices continue beyond its lifetime.



2. Role of WP6 and the Deliverable 6.1 labour market skills of the tourism and hospitality industry

The core mission of WP6 is to translate project results into actionable policy recommendations at both national and European levels. It aims to:

- identify common skills gaps and labour market challenges across the partner countries,
- propose evidence-based measures for a more resilient and sustainable sector,
- provide a strategic framework to support policy makers, governments, and EU institutions.

More specifically, the Deliverable 6.1 – Policy Report on Labour Market Skills for the Tourism and Hospitality Industries represents the first output of WP6.

Its preparation followed three main steps:

1. Collection and review of the seven national policy reports, elaborated by the project partners in Bulgaria, Cyprus, Greece, Italy, Portugal, Slovenia and Spain.
2. Comparative analysis of findings to identify both shared challenges and country-specific issues.
3. Synthesis of results into a European policy perspective, designed to support policy making in skills, training, and employment in the tourism and hospitality sector.

The aim of Deliverable 6.1 is therefore twofold:

- to provide an updated overview of the tourism and hospitality labour market, focusing on skills requirements and shortages;
- to develop a set of shared policy recommendations to strengthen competitiveness, sustainability, and inclusiveness of the sector at European level.

During the following months of the project, three additional reports will follow, each focusing on a specific area of analysis and policy recommendation, until the completion of the GreenHost Project.

The Report 6.2 – Policy Report on Reforms Supporting Sustainability in the Tourism/Hospitality Management Industries, scheduled for release in February 2026, will address reforms that support sustainability in the sector.

The Report 6.3 – Policy Report on Reforms Supporting Green Entrepreneurship, scheduled for delivery in September 2026, will focus on policies and measures that promote green entrepreneurship.



Finally, the Report 6.4 – Policy Report on the GreenHost Initiative – End Results, to be completed in November 2027, will serve as the final report of the project, summarising the achieved results and outlining recommendations for future implementation.



3. Introduction of the Report

The *Policy Report on Labour Market Skills for the Tourism and Hospitality Industries* (Deliverable 6.1) represents the first policy-oriented output of the GreenHost project. Its main purpose is to analyse, compare, and synthesise the findings emerging from the seven *National Policy Reports* developed by project partners in Bulgaria, Cyprus, Greece, Italy, Portugal, Slovenia, and Spain.

These national reports were elaborated under a common methodological framework, ensuring consistency, comparability, and a coherent foundation for cross-country analysis.

Each national report includes:

- an analysis of the economic and labour market context of the tourism sector;
- a PEST analysis (Political, Economic, Social, Technological factors) influencing the industry;
- identification of skills shortages, training gaps, and workforce dynamics;
- a review of existing national policies, education systems, and sustainability strategies;
- and the formulation of national-level recommendations aimed at improving employability, digitalisation, and sustainability.

This shared structure enabled the project to identify both common European trends and national specificities, facilitating a comparative understanding of labour market conditions, skills needs, and training systems across Europe.

Building on these national analyses, the present policy report provides:

- an overview of national contexts, including the socio-economic weight of tourism and hospitality and the sector's role in employment;
- a comparative analysis of labour market challenges and opportunities;
- a synthesis of national recommendations, transformed into shared European-level policy proposals;
- and an evidence base for policy makers and stakeholders at both national and EU levels to support more sustainable and future-proof workforce strategies.

Therefore, this deliverable is not only a descriptive document but also a strategic tool: it connects research with policy, national insights with European action, and short-term needs with long-term transformations, particularly those driven by the green and digital transitions.



The following sections summarise the main evidence and findings from the seven national reports, highlighting the labour market dynamics, skills needs, and policy responses identified by national experts and stakeholders. Together, these insights form the backbone of the European-level policy analysis presented in this report, aligning GreenHost's outcomes with broader EU priorities such as the European Green Deal, the Digital Transition, and the Pact for Skills.



4. Theoretical Framework

The analysis presented in this report is grounded in theoretical perspectives on labour market dynamics, skills development, and sustainable transitions.

The tourism and hospitality sector, as a service-intensive industry, reflects the interaction among labour demand, skills supply, and institutional mechanisms that shape workforce adaptation.

4.1 Labour Market Theories

Classical and contemporary labour market theories emphasise the role of human capital and skills formation in productivity and competitiveness. According to Becker's Human Capital Theory, investments in education and training represent key determinants of individual productivity and aggregate economic performance (Becker, G. S., 1993, *Human Capital: A Theoretical and Empirical Analysis, with Special Reference to Education*, 3rd ed., University of Chicago Press).

Within this perspective, tourism labour markets are characterised by structural asymmetries — including seasonal demand, high labour turnover, and occupational segmentation — which limit long-term skill accumulation. From a search and matching theory viewpoint, the recurrent skills mismatch observed in tourism can be interpreted as the outcome of imperfect coordination between education systems and employers' evolving requirements (Pissarides, C. A., 2000, *Equilibrium Unemployment Theory*, 2nd ed., MIT Press). This theoretical approach explains how frictions in job matching processes generate persistent unemployment and unfilled vacancies despite apparent labour shortages.

In the context of the GreenHost taxonomy, this mismatch also reflects uneven development across digital, green, intercultural, managerial & entrepreneurial, and social innovation skill domains. Each domain interacts differently with labour market dynamics — digital and managerial competences enhance productivity, while intercultural and social innovation skills mitigate turnover and improve workforce cohesion. Green and digital skills, in particular, emerge as pivotal in shaping employability and competitiveness, as they directly respond to technological and environmental transformations redefining the structure of tourism employment.

4.2 Skills Development and Lifelong Learning

The theoretical foundation of this report also draws on skills ecosystem theory and the literature on lifelong learning and vocational education. Finegold (1999) originally introduced the concept of "skill ecosystems" to describe environments where firms, institutions, and training providers interact to sustain high-skill equilibrium systems (Finegold, D., 1999, "Creating Self-Sustaining, High-Skill Ecosystems," *Oxford Review of*



Economic Policy, 15(1), 60–81). Subsequent research by Buchanan, Anderson, and Power (2017) expanded this concept, arguing that effective skills formation depends on coordinated action among education providers, businesses, and public authorities within a given sector or region (Buchanan, J., Anderson, P., & Power, G., 2017, "Skill Ecosystems," in Warhurst C., Mayhew K., Finegold D., & Buchanan J. (eds.), *The Oxford Handbook of Skills and Training*, pp. 444–465, Oxford University Press).

In tourism, where many jobs are practical, customer-facing, and seasonal, the creation of a coherent skills ecosystem depends on flexible training systems and responsive curricula aligned with industry needs.

This conceptual lens provides a rationale for promoting Vocational Education and Training (VET) as a strategic lever to address labour market shortages, enhance employability, and foster innovation.

The GreenHost taxonomy reinforces this approach by framing VET and lifelong learning around five interrelated skill domains:

- Digital Skills – use and adaptation of digital tools, data, and technologies in tourism operations and marketing (e.g., CRM systems, data analytics, AI tools, and smart tourism platforms).
- Green Skills – knowledge and abilities promoting sustainable resource use, waste reduction, and eco-innovation (e.g., circular economy practices, energy management, sustainable mobility).
- Intercultural Skills – competences for effective collaboration in culturally diverse environments (e.g., multilingualism, cultural awareness, inclusive customer service).
- Managerial & Entrepreneurial Skills – strategic and organisational capabilities (e.g., financial planning, project management, innovation management).
- Social Innovation Skills – abilities supporting community engagement and co-creation of social and economic value (e.g., participatory governance, social entrepreneurship).

Within this taxonomy, green and digital skills emerge as the most dynamic and transferable domains in the evolving employment landscape. They serve as cross-sectoral enablers that integrate environmental stewardship and technological literacy into professional profiles, reinforcing resilience and adaptability in tourism labour markets.

4.3 Sustainability and Skills Transitions

The transition towards a green and digital economy introduces complex dynamics linking technological innovation, environmental policy, and human capital development. From an environmental economics perspective, the green transition reshapes production and consumption patterns, leading to shifts in occupational

structures and the emergence of new skill requirements (Organisation for Economic Co-operation and Development [OECD], 2021, *Green Skills and Innovation for Inclusive Growth*, OECD Publishing). Similarly, digital transformation modifies work organisation and service delivery, generating new demand for digital literacy, data management, and technology-mediated customer interaction.

Integrating these transitions into labour market analysis reveals that sustainability is not only an environmental objective but also a skills development challenge. Tourism and hospitality, as experience-based industries, thus constitute a critical field in which the economic, environmental, and social dimensions of sustainability converge through workforce transformation.

According to the GreenHost framework, these transformations are operationalised through green and digital skills as the principal drivers of change in the employment landscape. Green skills enable workers to align with environmental standards and sustainable practices, while digital skills underpin innovation, automation, and data-driven service enhancement.

Together, they act as dual accelerators of structural adaptation, complemented by managerial, intercultural, and social innovation skills that ensure inclusivity, creativity, and systemic implementation.

4.4 Conceptual Model

In this report, the interaction between labour market structures, policy interventions, and skills development is conceptualised as a dynamic system. Policies influence the supply of skills through education and training reforms, while industry demand determines their relevance and utilisation. External drivers — such as digitalisation, climate policies, and demographic shifts — continuously reshape this equilibrium, requiring adaptive policy responses and lifelong learning strategies.

This theoretical framework, therefore, provides the foundation for analysing national evidence, identifying cross-country challenges, and formulating policy recommendations that promote both labour market resilience and sustainability-oriented innovation.

Within this model, the **GreenHost Multidimensional Skills Taxonomy** acts as a classification system connecting theory and practice:

- **Digital skills** underpin productivity, innovation, and the integration of technology into tourism operations;
- **Green skills** enable ecological transition, circular economy adoption, and compliance with sustainability standards;
- **Intercultural skills** sustain inclusivity and global competitiveness in diverse work and client environments;

- **Managerial & entrepreneurial skills** drive organisational adaptation and strategic transformation;
- **Social innovation skills** anchor workforce changes in community engagement and collective problem-solving.

Crucially, the framework articulates how green and digital skills emerge as critical factors in the evolving employment landscape, serving as foundational capacities that mediate between environmental transformation, technological advancement, and workforce resilience. Together, these domains enable a holistic understanding of workforce transformation in tourism and hospitality, aligning human capital development with the imperatives of sustainable, digital, and inclusive growth.

Integrating Visual and Systemic Modelling

Conceptual models visually represent the complex interactions shaping skills development and sustainability transitions. Diagrams can map feedback loops among labour market supply, policy interventions, educational institutions, and industry demands. Highlighting these systemic linkages underscores how challenges in one area can cascade and reinforce others.

Such models serve as explanatory frameworks that guide strategic planning and coordination. They help identify leverage points where targeted interventions yield greater impact, enhancing the efficiency and coherence of policy responses.

Visual tools further improve accessibility for diverse audiences, including policymakers, educators, and industry partners. Incorporating these models early in the analysis contextualises empirical results by illustrating interdependencies and enabling a deeper understanding of dynamic change processes.

This approach encourages holistic thinking and cross-sector collaboration, revealing potential gaps in current policy responses and directing future research and action. By clarifying relationships within the system, visual models promote alignment of stakeholder efforts toward shared objectives, particularly in advancing sustainable, inclusive, and innovation-driven workforce strategies.

5. Methodology and Analytical Framework

The methodological approach adopted in this report is grounded in principles of comparative policy analysis and qualitative synthesis. It aims to ensure scientific rigour, transparency, and coherence across the seven national contexts examined. The methodology reflects both the analytical requirements of Work Package 6 and the broader objectives of the GreenHost project, which seek to translate empirical evidence into actionable policy recommendations at European level.

5.1 Research Design and Objectives

The methodological design follows an interpretive-comparative logic, combining documentary analysis with cross-national synthesis. Its primary objectives are to:

- identify convergent and divergent trends in the labour markets of the tourism and hospitality sectors across partner countries;
- examine how vocational education and training (VET) systems respond to evolving skills needs, particularly in the context of the green and digital transitions;
- assess the extent to which national policies integrate sustainability principles within human capital development strategies.

This dual focus on labour market dynamics and sustainability forms the analytical axis of the report, guiding both data selection and interpretation.

5.2 Sources of Evidence and Data Collection

Empirical evidence is derived from a triangulation of complementary sources:

1. **Primary sources** – The seven *National Policy Reports* produced by GreenHost partners (Bulgaria, Cyprus, Greece, Italy, Portugal, Slovenia, and Spain). Each report was drafted under a harmonised template developed to ensure consistency of scope, structure, and terminology.
2. **Secondary sources** – National and European policy frameworks, including Recovery and Resilience Plans, VET and employment strategies, and tourism development policies. These documents provide contextual grounding for interpreting national findings.
3. **Quantitative data** – Official statistics from Eurostat, the OECD, and national statistical offices, complemented by sectoral data from the World Travel & Tourism Council (WTTC). These indicators establish a baseline for economic significance, employment structures, and skill-demand trends in tourism.

This triangulated evidence base ensures both empirical robustness and policy relevance.

5.3 Analytical Procedure

The analytical process followed an iterative and multi-stage design:

1. **Data harmonisation:** national inputs were standardized according to shared analytical categories covering labour market indicators, training systems, sustainability dimensions, and governance mechanisms.
2. **Thematic coding:** qualitative content was coded along predefined dimensions (e.g. skills mismatch, labour precarity, policy innovation) to facilitate comparison.
3. **Cross-country synthesis:** the coded material was systematically compared to identify recurrent patterns and contextual specificities, highlighting institutional, socio-economic, and policy variations.
4. **Validation and peer review:** draft findings were jointly reviewed by national partners and WP6 coordinators to verify accuracy and ensure alignment with the GreenHost analytical framework.

This combination of inductive and deductive reasoning allowed the report to move from empirical description toward interpretive generalisation.

5.4 Criteria for Comparability and Analytical Boundaries

Comparative validity was ensured through:

- the use of a common analytical structure across all national reports;
- reliance on standardised statistical indicators aligned with Eurostat and OECD classifications;
- analytical focus confined to the tourism and hospitality ecosystem, excluding non-relevant service sectors;
- adherence to EU strategic frameworks, notably the European Green Deal, the Digital Transition Agenda, and the Pact for Skills.

These boundaries delineate the analytical field and safeguard conceptual consistency across heterogeneous national contexts.



5.5 Methodological Limitations and Ethical Considerations

As with most cross-national comparative research, certain constraints emerge from differences in data coverage, temporal alignment, and definitional precision among national sources. Variations in the granularity of available statistics occasionally limit direct numerical comparability; however, these gaps were mitigated through triangulation with qualitative evidence and expert validation.

All analyses were conducted in compliance with EU research ethics and data protection standards, including the General Data Protection Regulation (GDPR). Information drawn from partner reports was anonymised and verified exclusively through publicly accessible or officially validated materials. The methodological approach thus combines transparency with respect for data integrity and confidentiality.



6. Evidence from National Reports

Bulgaria

Tourism in Bulgaria accounts for approximately 6.9% of the national GDP, underscoring its importance as a strategic sector for the economy. Nevertheless, the Bulgarian tourism industry faces persistent labour shortages, a strong dependence on seasonal and foreign workers, and a low level of digitalisation, particularly among small and medium-sized enterprises (SMEs). The sector's competitiveness is further weakened by the limited integration of tourism into national innovation and skills strategies. Despite a post-pandemic recovery, enterprises continue to struggle with recruiting and retaining qualified personnel. Training pathways often remain theoretical and disconnected from actual market needs. The national partners – the Ministry of Tourism of Bulgaria (MTBG), Euro-Alliance Ltd., and the Plovdiv Chamber of Commerce and Industry (PCCI) – emphasise the need to strengthen VET–industry cooperation, enhance digital skills, and officially recognise tourism as a national policy priority to secure its sustainable development.

Analytical insights:

Despite the presence of several strategic frameworks – including the National Strategy for Sustainable Tourism Development 2014–2030 and the Employment Strategy 2021–2030 – Bulgaria continues to face implementation gaps.

Training measures remain highly dependent on EU funding and often fail to ensure long-term integration between VET providers and enterprises. The weak digital maturity of SMEs and the lack of coordinated workforce planning exacerbate seasonal dependency and limit innovation capacity. Moreover, the tourism sector still lacks visibility within national industrial and education policies, reducing its political priority.

Comparative perspective:

Compared with Slovenia or Portugal, Bulgaria's monitoring and evaluation mechanisms for skills policies are still underdeveloped. The absence of a national observatory or forecasting platform hinders evidence-based decision-making. However, Bulgaria's smaller scale and growing network of regional clusters offer an opportunity to pilot dual education schemes and targeted incentives for green and digital transformation. Strengthening inter-ministerial cooperation and introducing measurable sustainability indicators would significantly enhance policy effectiveness.



Cyprus

Tourism in Cyprus contributes around 19% of the national GDP, making it one of the most tourism-dependent economies in Europe. However, the sector continues to face persistent structural challenges, including high seasonality, low wage levels, and significant labour turnover, which together hinder the attraction and retention of local workers.

Moreover, approximately 43% of the tourism workforce consists of third-country nationals, reflecting the industry's structural reliance on migrant labour. At the same time, the diffusion of digital and green competences remains limited, with only about half of the Cypriot population possessing basic digital skills. Despite recent initiatives, challenges persist in retaining skilled workers over the long term and in embedding sustainability principles across all levels of the tourism and hospitality industry.

Analytical insights:

Cyprus's tourism model remains heavily reliant on migrant labour and low-wage seasonal employment. While initiatives supported by the Human Resource Development Authority (HRDA) have improved access to training, they have not yet generated a stable career progression system or substantially upgraded the skills base in sustainability and management. The limited diffusion of advanced digital competences and the insufficient integration of green practices across SMEs continue to constrain competitiveness. Structural issues such as housing shortages for seasonal staff and limited local workforce participation exacerbate the sector's vulnerability.

Comparative perspective:

Compared to Greece and Italy, Cyprus has been proactive in linking reskilling incentives with digital and circular economy policies, yet implementation remains fragmented. Unlike Portugal, where sustainability is embedded in governance, Cyprus still treats environmental goals as project-based initiatives. The country's small size and centralised institutions could, however, become an advantage if a National Tourism Skills Framework is established—allowing closer coordination among the Ministry of Tourism, VET providers, and the private sector.

Greece

Tourism contributes 12.7% to national GDP (approximately €30.2 billion in 2024) and directly employs more than 401,000 workers. Despite its strong contribution, the sector faces a severe labour shortage, with over 53,000 vacancies reported in 2023. The University of Macedonia (UOM), Technical Institute of Heraklion Chamber (TIHC), The Chamber of Commerce of Chalkidiki and OECON Group highlight persistent gaps in digital, green, and soft skills, combined with low job attractiveness and limited career



progression opportunities. Many tourism SMEs are still lagging behind in adopting digital solutions, AI tools, and sustainability standards. The recent Law 5082/2024 on Vocational Education and Training (VET) aims to modernise training systems, while national initiatives such as reskilling vouchers and the modernisation of public IEK and SAEK training centres seek to bridge the skills gap and improve employability in the tourism sector.

Analytical insights:

Greece's ambitious reforms in VET and reskilling have reached wide participation, but structural labour shortages and strong seasonality persist. Voucher-based programmes have proven effective in quantity but less in quality, often lacking alignment with employers' real skill needs. The overemphasis on basic digital literacy, rather than higher-level green and managerial competences, limits long-term employability and innovation potential. Moreover, monitoring systems remain weak, and there is limited follow-up to assess training outcomes.

Comparative perspective:

In contrast to Portugal and Slovenia, Greece has not yet institutionalised permanent observatories or sustainability indicators for workforce development. Its policy focus remains on recovery measures rather than structural transformation. Nonetheless, the recent Law 5082/2024 represents a solid foundation for a systemic reform of VET, provided that regional authorities and enterprises are fully engaged. Greece could benefit from adopting the ecosystem-based approach seen in countries like Spain, linking training provision with local tourism innovation labs and sustainable business clusters.

Italy

Tourism in Italy accounts for about 13% of GDP and provides employment for approximately 1.3 million workers across more than 300,000 enterprises, primarily SMEs. Italian partners - AITR (Associazione Italiana Turismo Responsabile) and CSL La Cremeria - identify persistent challenges such as high seasonality, low wages, and limited uptake of digital and green practices. While Italy has adopted forward-looking strategies, such as the Digital Tourism Hub, the National Recovery and Resilience Plan (PNRR), and the National Tourism Strategy 2023–2027, the implementation of eco-certifications and digital tools remains fragmented. Moreover, the sector struggles to attract younger generations and skilled professionals due to precarious conditions. Future competitiveness depends on strengthening cooperation between education and business, improving career pathways, and embedding sustainability and inclusion as core principles of national tourism policy.

Analytical insights:

Italy demonstrates a strong policy framework under the Tourism Strategic Plan 2023–2027 and the National Recovery and Resilience Plan (PNRR), yet the fragmentation of responsibilities among ministries and regions weakens coherence. The Tourism Digital Hub has improved data integration and marketing, but its impact on workforce quality and SME innovation remains modest. Training incentives such as the Fondo Nuove Competenze are well-designed but underutilised by micro and small enterprises due to bureaucratic and administrative barriers.

Comparative perspective:

Compared to Portugal, where sustainability is operationalised through measurable targets, Italy still treats it as a policy objective rather than a practice integrated into enterprise management. Nevertheless, the regional VET ecosystems, especially in Emilia-Romagna and Lombardy, illustrate promising models of public–private collaboration. Aligning these local successes with national frameworks could enhance policy scalability. Italy's challenge is to move from a project-based to a systemic approach that embeds sustainability, inclusion, and lifelong learning into all tourism governance levels.

Portugal

Portugal experienced a record year in 2023, with 30 million guests and 77 million overnight stays, which accounted for 19.6% of the country's GDP. The tourism sector is a central pillar of the national economy, supported by the Polytechnic Institute of Porto (IPP) and Turismo de Portugal – North (TPNP). While the country demonstrates excellence in strategic planning, particularly through the Tourism Strategy 2027 and the Destination Watch observatory, it continues to face challenges related to sustainability, workforce stability, and skill development. Key issues include the concentration of tourism in coastal areas, the rising cost of housing in major destinations, and socio-environmental pressures on local communities. There is a growing demand for professionals trained in digital marketing, data management, and sustainable operations. Portugal's experience demonstrates that a well-integrated national strategy can serve as a model for other EU Member States.

Analytical insights:

Portugal stands out for its coherent integration of sustainability, innovation, and skills governance. The *Tourism Strategy 2027* and the *Destination Watch* network have transformed sustainability into an evidence-based policy domain. However, persistent precarity, wage disparities, and workforce instability still undermine social sustainability. Training systems, though extensive, remain more focused on operational and technical skills than on leadership, innovation, and green entrepreneurship—areas critical for long-term competitiveness.



Comparative perspective:

Portugal's policy coherence contrasts with the fragmented systems in southern partners such as Greece and Cyprus. Its monitoring mechanisms and integration of circular economy principles provide a valuable European benchmark. Yet, compared with Slovenia, Portugal's social sustainability agenda—fair work, gender equality, work-life balance—remains less developed. The next strategic cycle could therefore expand the sustainability paradigm to include stronger social and labour dimensions alongside environmental and digital objectives.

Slovenia

Tourism contributes approximately 5.2% of GDP (2023) and has become a symbol of sustainable tourism in Central Europe. The Slovenian partners – the Maribor Tourist Board (MTB) and the Secondary School of Gastronomy and Tourism in Maribor (SŠGT) – report that while the country has built a strong reputation through its "Slovenia Green" certification, significant challenges persist. The sector remains characterised by seasonality, labour shortages, and low digitalisation levels among SMEs. Employment in the hospitality industry (approximately 44,000 jobs) remains largely seasonal. Although Slovenia's Tourism Strategy 2022–2028 and government-supported training vouchers promote reskilling and lifelong learning, a gap remains between sustainability ambitions and the skills available in the workforce. Integrating circular economy practices and sustainable management into education and business models remains a national priority.

Analytical insights:

Slovenia has established itself as a European frontrunner in sustainable tourism branding through the Slovenia Green certification, yet labour and skills challenges persist. Seasonal employment, low wages, and limited career mobility continue to affect the sector's attractiveness. The country's advanced forecasting tools and labour observatories are valuable assets, but the translation of data into training reform is still partial. The focus on environmental excellence is sometimes challenged by the need for digital literacy and managerial upskilling within SMEs.

Comparative perspective:

Compared to other countries, Slovenia stands out for its advanced sustainability branding (Slovenia Green) and comprehensive policy frameworks, similar to Portugal's regional observatories. However, labour and skills challenges mirror those of Spain, Greece, and Italy, where seasonality, low wages, and weak career progression hinder workforce stability. Overall,



Slovenia's model combines strong environmental excellence with moderate digital and skills adaptability, requiring integrated upskilling policies to sustain competitiveness

Spain

Tourism represents 12.3% of Spain's GDP and employs 2.94 million workers, equivalent to 13.4% of total employment. The sector is characterised by a high level of job precarity (41.6%), particularly affecting women (45%) and young people (60%). Spanish partners – CETT (University of Barcelona), Aethnic – Ethical Tourism Association of Catalonia, and the Chamber of Commerce of Girona (CCIG) – emphasise the urgent need to improve job quality and professional development opportunities. Although Spain is a global leader in tourism innovation and has received substantial NextGenerationEU funding (€225 million) to promote digitalisation and smart tourism, structural challenges remain: skills shortages in green and digital competences, low career mobility, and social tensions linked to overtourism and housing affordability. The sector requires stronger coordination between regional governments, educational institutions, and employers to ensure sustainable growth.

Analytical insights:

Spain combines global leadership in smart and digital tourism with persistent social vulnerabilities. While EU-funded programmes have accelerated innovation, precarious work remains pervasive—particularly among women and young people. Collective agreements and initiatives such as the Las Kellys Movement have improved job protection, yet structural inequalities in wage levels and career opportunities persist. Furthermore, training initiatives often prioritise digital transformation without adequately addressing green skills or sustainable management.

Comparative perspective:

Compared with Italy and Portugal, Spain has developed a broader and more technologically advanced ecosystem of *Smart Destinations*, but sustainability and labour policies are not yet fully synchronised. The decentralised governance system allows for regional innovation but also generates fragmentation. Spain could strengthen its leadership by coupling its digital excellence with stronger integration of environmental and social sustainability—aligning regional initiatives under a unified national framework similar to Portugal's *Destination Watch* model.

7. Common Challenges Across Partner Countries

The comparative analysis of the seven national reports reveals a consistent set of structural challenges that affect the tourism and hospitality labour market across Europe. Despite national differences, all participating countries share similar weaknesses that threaten the long-term sustainability, competitiveness, and attractiveness of the sector.

7.1. Shortage of Qualified Workforce and High Seasonality

A shortage of skilled workers represents one of the most critical challenges identified in all partner countries. Labour demand continues to outpace supply, especially after the COVID-19 pandemic.

- In Greece, more than 53,000 vacancies remained unfilled in 2023.
- In Bulgaria, the sector depends heavily on seasonal and foreign workers, without a coherent national strategy for workforce planning.
- In Cyprus, over 43% of employees in the sector are third-country nationals, highlighting a strong reliance on migrant labour.
- Spain: Persistent labour shortages and high staff turnover.
- Italy: Labour shortages, especially in hospitality; strong seasonal employment cycles.
- Slovenia: The sector shows stronger progress in sustainability branding than in digital transformation, where SMEs still face major capacity and infrastructure gaps.
- Portugal: Seasonal pressure on coastal and island destinations, with staff shortages during peak months.

The high degree of seasonality, particularly in Mediterranean destinations, leads to unstable employment, limited career development, and difficulties in maintaining a skilled, year-round workforce.

7.2. Job Precarity and Low Attractiveness of the Sector

Temporary contracts, low pay, and demanding working conditions undermine the attractiveness of tourism-related jobs, especially for younger workers and local populations.

- In Spain, 41.6% of tourism workers are employed under precarious conditions—twice the national average.



- In Italy and Greece, wages in the sector are significantly below national averages and are strongly influenced by seasonality.
- Cyprus – Low salaries, long hours, and low job satisfaction.
- Bulgaria – Temporary and informal contracts common in peak season.
- Slovenia – Low wages and part-time contracts limit job attractiveness.
- Portugal – Quality employment remains a policy challenge despite strong recovery.

Such instability contributes to high turnover rates and discourages the retention of skilled professionals, reducing the sector's capacity to offer sustainable and high-quality employment.

7.3. Digital and Green Skills Gaps

Tourism SMEs across Europe still face slow digital transformation and limited integration of sustainability-oriented skills.

The European tourism ecosystem is composed of approximately 2.3 to 2.4 million enterprises, almost all of which are small and medium-sized (SMEs), according to the European Parliament and Eurostat. Despite their crucial role—representing about 99 % of all tourism businesses and providing millions of jobs across the EU—many SMEs continue to operate with low levels of digital maturity and limited capacity to adopt green practices.

Strengthening their digital and sustainability competences is therefore essential for ensuring the sector's competitiveness and alignment with the EU's Green and Digital Transition objectives (Sources: European Parliament, "Tourism" Factsheet, 2024; Eurostat, "Tourism industries – economic analysis", 2024).

Many companies lack digital marketing tools, CRM systems, or smart tourism technologies. For example:

- In Greece, few businesses use AI, data analytics, or digital management systems.
- In Cyprus, only around 50% of the population has basic digital skills, well below the EU average.
- Italy and Slovenia report limited adoption of eco-certifications and circular economy practices.
- Bulgaria – Slow digitalisation and limited green transition capacity.
- Portugal – Systematic monitoring via "Destination Watch" but regional gaps remain in digital maturity.



These deficits restrict innovation, reduce competitiveness, and limit the sector's contribution to the green and digital transitions promoted by EU policy frameworks.

7.4. Misalignment Between Education and Labour Market Needs

The existing Vocational Education and Training (VET) systems in most partner countries are still insufficiently responsive to the evolving demands of the labour market. Specifically:

- In Spain and Italy, VET curricula remain largely theoretical and do not adequately cover sustainability, intercultural communication, or emerging technologies.
- In Greece, programmes often neglect soft skills and social innovation.
- In Cyprus, training provision does not match the increasing demand for digital and green competencies.
- In Bulgaria – Need for modernised VET and better integration of green skills.
- In Slovenia – Strong strategies exist but alignment and monitoring are still challenged.
- In Portugal, Regional observatories exist but need more connection with skill supply chains.

A stronger alignment between education systems, enterprises, and local authorities is necessary to bridge the skills gap and create training pathways that reflect real-world employment opportunities.

7.5. Dependence on Migrant and Third-Country Workers

Labour shortages have led to an increased reliance on migrant workers, particularly in seasonal and lower-skilled positions.

- Bulgaria and Cyprus depend heavily on third-country nationals, often without structured integration or career development policies.
- In Spain, approximately 45% of tourism workers come from migrant backgrounds.
- Italy – Significant migrant workforce, particularly in low-skilled hospitality jobs.
- Greece – High migrant presence, weak integration policies.
- Slovenia – Labour inflows from neighbouring and Balkan countries.
- Portugal – Seasonal and service jobs increasingly filled by foreign workers.



Although migrant workers are essential for the continuity of the tourism industry, the lack of long-term integration strategies increases the risk of segmentation, job insecurity, and social vulnerability.

7.6. Social and Environmental Sustainability Challenges

Tourism growth has generated multiple sustainability challenges that affect both local communities and ecosystems.

- Overtourism in areas such as Venice (Italy), the Slovenian Alps, and Greek islands places stress on local infrastructure and residents.
- In Spain and Portugal, housing prices and living costs in tourist regions have surged, exacerbating social inequality.
- Environmental concerns—such as excessive water and energy use (Spain, Greece and Cyprus) and biodiversity loss are becoming increasingly urgent.

A transition towards sustainable tourism models is therefore essential, integrating environmental protection with social well-being and economic resilience.

Summary of Structural Issues:

Across all partner countries, the tourism and hospitality sector faces a common set of interrelated challenges that hinder its sustainable development and competitiveness:

- Labour shortages and strong seasonality continue to affect workforce stability and service quality.
- Job precarity and low attractiveness discourage young and skilled workers from entering or remaining in the sector.
- Persistent digital and green skills gaps limit innovation, productivity, and environmental transition.
- Training systems remain misaligned with labour market needs, reducing the effectiveness of education and VET pathways.
- Heavy dependence on migrant and third-country workers fills short-term gaps but risks reinforcing segmentation and instability.
- Growing social and environmental pressures—such as overtourism, housing costs, and resource use—threaten long-term sustainability.



These structural weaknesses are deeply interconnected and require coordinated European policy responses that focus on skills development, fair working conditions, and the sustainable transformation of the tourism and hospitality sector.



8. Existing National Reforms and Policy Initiatives

Across the seven GreenHost partner countries, some efforts have been made to modernise the tourism and hospitality sector through a range of national reforms and strategic programmes.

In the national reports, specific attention was devoted to collecting and analysing existing policy frameworks and reforms implemented at different levels within each country — both sectoral (tourism and hospitality) and cross-sectoral (labour market and education).

These initiatives reflect an already existing commitment to addressing persistent skills shortages, improving vocational education and training systems, and enhancing coordination between education providers, enterprises, and public authorities. They also demonstrate a growing emphasis on modernising the workforce, reducing skills mismatches, and promoting sustainability and digital transformation in line with European policy priorities.

Bulgaria

Tourism plays a strategic role in Bulgaria's economy, driven by its diverse natural, cultural, and spa resources, as well as its key position in the Balkans. Despite a solid post-pandemic recovery, the sector continues to face severe labour shortages, a strong dependence on seasonal and foreign workers, and slow progress in digitalisation and sustainable management.

In recent years, Bulgaria has advanced several national frameworks that address these issues across both the labour market and the tourism industry (see table 1). The Employment Strategy 2021–2030, the National Recovery and Resilience Plan, and the Digital Transformation of Bulgaria 2020–2030 all include measures to modernise skills, promote innovation, and align education with employer needs.

In conjunction with the National Strategy for Sustainable Tourism Development 2014–2030, these initiatives aim to enhance competitiveness and foster a more skilled, year-round workforce.

Table 1 – Existing policy framework and reforms in Bulgaria

Policy / Instrument	Lead Body	Period	Key Focus/Description
Employment Strategy 2021–2030	Ministry of Labour & Social Policy	2021–2030	Employer-led training; apprenticeships; adult-learning digital platforms;



			improves VET quality.
National Recovery & Resilience Plan (RRP)	Government of Bulgaria	2021–2026	Funds digital and green transition projects including connectivity, training, and tourism-related SMEs.
Digital Transformation of Bulgaria 2020–2030	Ministry of Transport & Communications	2020–2030	Expands digital infrastructure and skills; supports e-services, data literacy, and digital readiness of SMEs.
National Development Programme Bulgaria 2030	Council of Ministers / Ministry of Finance	2020–2030	Top-level framework for skills, innovation, and regional policy; aligns EU funds and national priorities.
National Strategy for Sustainable Tourism Development 2014–2030	Ministry of Tourism	2014–2030	Defines long-term goals for sustainable tourism; calls for stronger VET–industry alignment and eco-certification
Operational Programme “Human Resources Development” (OP HRD)	Ministry of Labor and Social Policy	2014–2020	ESF-funded program to improve employment, social inclusion, and vocational training; supports apprenticeships, traineeships, and upskilling in the hospitality sector.
Law on Vocational Education and Training (VET Act)	Parliament; Ministry of Education and Science; NAVET	2010s–present	Primary legislation for VET governance, dual education, work-based learning, and validation of non-formal

			learning; enhances relevance to labor market needs.
National Strategy for Vocational Education and Training 2015–2020	Ministry of Education and Science; NAVET	2015–2020	Strategic plan to modernize VET, improve quality and employer links, update standards and curricula, and promote work-based learning.
Youth Guarantee Implementation Plan (Bulgaria)	Ministry of Labor and Social Policy; Employment Agency	2014–ongoing	National plan under the EU Youth Guarantee to provide employment, education, or training opportunities for young people, including in tourism and hospitality.

Cyprus

Tourism remains a cornerstone of the Cypriot economy, accounting for nearly 20% of the national GDP and providing thousands of direct and indirect jobs. The sector's recovery after the pandemic has been robust, yet structural challenges persist: heavy seasonality, dependence on migrant and third-country workers, and significant gaps in digital and green competences.

Recent policy reforms aim to address these weaknesses through stronger coordination between government, education providers, and industry (see Table 2). Within the framework of the EU Pact for Skills, Cyprus has prioritised reskilling and lifelong learning initiatives, supported by the Recovery and Resilience Plan (RRF).

National discussions on green taxation, digitalisation incentives, and inclusive labour policies show a clear move toward a more sustainable and knowledge-based tourism model that balances economic growth with environmental and social responsibility.

Table 2 – Existing policy framework and reforms in Cyprus

Policy / Instrument	Lead Body	Period	Key Focus/Description



Digital Skills Training (Cyprus Government Portal)	Ministry of Education, Sport and Youth; Deputy Ministry of Research, Innovation and Digital Policy	Ongoing (updated annually)	Online training and certification in basic and advanced digital skills, accessible via gov.cy; part of the National Digital Strategy 2020–2030 and aligned with the EU Digital Compass and the EU Pact for Skills.
Human Resource Development Authority of Cyprus (HRDA / ANAD) – Subsidised Training Programmes	Human Resource Development Authority of Cyprus (HRDA / ANAD)	Ongoing (since 2020, renewed 2023–2026)	Multi-company and single-company training for employees, unemployed, and youth, covering digital, technical, sustainable, and intercultural skills to reduce labour market mismatches in tourism and hospitality; co-financed by national and EU funds (ESF+, RRF).
Transition of Hotels to a Green & Circular Economy (RRP – Axis 3)	Directorate-General for European Programmes, Coordination	2023–2026	RRP measure supporting hotels in adopting circular and sustainable

	& Development (DG EPCD); Ministry of Finance; Deputy Ministry of Tourism		practices through consultancy, training, mentoring, and certification; aims to strengthen green and circular competencies in hospitality; financed under the RRP's tourism sustainability budget.
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Greece

Tourism remains one of the most vital pillars of the Greek economy, generating around 12–13% of national GDP and supporting hundreds of thousands of jobs. Over the last decade, and especially after the COVID-19 pandemic,

Greece has undertaken several reforms to stabilise employment, improve workforce skills, and stimulate innovation within the hospitality industry (see table 3). However, persistent structural challenges — such as pronounced seasonality, low wages, and skills gaps in digitalisation and sustainability — continue to limit productivity and job quality.

Recent policy efforts, including the National Tourism Strategy 2020–2025, the Greece 2.0 Recovery and Resilience Plan, and comprehensive VET reforms, demonstrate the country's commitment to aligning the tourism workforce with emerging green and digital trends. Programmes for reskilling and upskilling, together with incentives for sustainable business practices, show a clear policy direction towards a more inclusive, innovative, and environmentally responsible tourism ecosystem.

Table 3 – Existing policy framework and reforms in Greece

Policy / Instrument	Lead Body	Period	Key Focus/Description
Tourism Reskilling & Upskilling Voucher	Ministry of Tourism	2024–2025	250-hour continuing vocational



			training (7 specialisations), asynchronous e-learning with €5/hour allowance. Aims to upskill and reskill tourism workers through inclusive digital learning. Funded under Greece 2.0 (RRF).
Greece 2.0: Tourism Education Actions (RRP Component 4.6)	Ministry of Tourism / Ministry of Finance	2021-2026	Supports diversification and season extension through Green and Blue Tourism. Establishes national/regional tourism observatories and promotes sustainability
Digital Transformation of the Register of Tourism Businesses	Ministry of Tourism	2024-2026	Creation of 'MyDigitalTourism' platform and digitalisation of business registry to reduce bureaucracy, enhance data monitoring, and integrate sustainability indicators.
Action 16921: Reskilling & Upskilling in Tourism (Voucher Training)	Ministry of Tourism	2020–present	Voucher-based upskilling/reskilling for tourism workers via blended learning and digital monitoring. Over 160,000 beneficiaries trained.

Public VET Institutes (IEK/SAEK) Upgrade	Ministry of Tourism	2025–ongoing	Comprehensive reform of public VET institutes to modernise curricula, facilities, and employer partnerships. Embeds sustainability and digitalisation modules.
VET System Strengthening – Law 5082/2024	Ministry of Education & Religious Affairs; EOPPEP	2024–ongoing	Reinforces VET system through new centres (KEEK), career offices, and apprenticeship expansion. Promotes employer engagement but limited tourism-specific focus.
DYPA Apprenticeship Programs for Tourism & Hospitality	Ministry of Labour & Social Affairs / DYPA	2020–2024 (continuous)	Nationwide apprenticeships in hotels and restaurants combining classroom and on-the-job training. Strong on practical skills but lacking green/digital modules.
Collective Labour Agreements (Hotel & F&B)	Ministry of Labour & Social Affairs / SETE / POEET	2023–2025	Sectoral collective agreements with 5% and 3% wage increases. Reinforce worker protection but rarely link to skills upgrading or training.
Partnership for Regional Development 2021–2027 (NSRF)	Ministry of Development & Investments	2021–2027	National framework (NSRF/ESF+) supporting regional skills, employment, and inclusion aligned

			with green and digital transition in tourism regions.
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Italy

Italy's tourism and hospitality sector is central to its cultural and economic identity, accounting for approximately 13% of GDP and employing around 1.3 million people. The country faces well-known structural problems — seasonality, regional disparities, and limited adoption of green and digital innovation — yet it has made important progress through large-scale reforms.

Under the National Recovery and Resilience Plan (PNRR), Italy has launched ambitious initiatives to modernise infrastructure, digitalise SMEs, and reskill the workforce. The Tourism Strategic Plan 2023–2027 and the creation of the Digital Tourism Hub (Hub Digitale del Turismo) mark decisive steps toward a more data-driven and sustainable sector. Policy attention has also shifted to lifelong learning and inclusion, ensuring that the transition to greener and smarter tourism fosters quality employment and enhances Italy's global competitiveness.

Table 4 – Existing policy framework and reforms in Italy.

Policy / Instrument	Lead Body	Period	Key Focus/Description
National Recovery and Resilience Plan (NRRP – PNRR) – Mission 1 (Tourism & Culture 4.0)	Ministry of Tourism; Ministry of Culture; Ministry for Technological Innovation and Digital Transition	2021–2026	Supports digitalization, sustainability, and competitiveness in tourism and culture. Includes reforms for public administration efficiency, digital tourism hub, training for digital/green skills, and harmonization of tourist guide standards. Budget: €6.7 billion.



National Strategic Plan for Tourism 2023–2027 (PST)	Ministry of Tourism; ENIT	2023–2027	Enhances competitiveness, sustainability, and inclusivity. Introduces Tourism Digital Hub, recognizes 'digital nomads', promotes digital and green innovation, and focuses on reskilling. Integrates with NRRP.
Tourism Digital Hub (TDH)	Ministry of Tourism; ENIT	2023–2024 (within PST & NRRP)	National platform unifying digital data, marketing, and sustainability for tourism. Promotes interoperability, data-driven
New Skills Plan – Transitions (Piano Nuove Competenze – Transizioni)	Ministry of Labour and Social Policies	2024–ongoing	Expands access to training under the GOL program; introduces on-the-job, apprenticeship, and internal corporate training for green and digital transitions. Enhances workforce adaptability.
New Skills Fund – Third Edition (Fondo Nuove Competenze – 3rd Edition)	Ministry of Labour and Social Policies; Sviluppo Lavoro Italia; INPS	2024	Funds enterprise reskilling and upskilling in digital and green transitions, reimbursing labour costs for training hours. Budget: €731 million
GOL Programme – Guarantee	Ministry of Labour and Social Policies; digital and green	2021–2025	Active labour market program offering tailored

of Employability of Workers	training. Budget: €4.4 billion.	Sviluppo Lavoro Italia	upskilling/reskilling and reintegration pathways. Prioritizes
Emilia-Romagna Regional VET and Apprenticeship System (Rete Politecnica, ITS, IeFP)	Emilia-Romagna Region (Department for Education, Training and Labour)	Continuous (latest 2024-2026)	Provides VET, ITS, and apprenticeship training in hospitality and tourism. Focuses on digital, sustainability, and foreign language skills. Strong public-private partnerships; high employability rates.

Portugal

Portugal's tourism industry has emerged from the pandemic stronger than ever, recording historic levels of arrivals, overnight stays, and export revenues in 2023.

The sector now accounts for nearly 20% of GDP and plays a pivotal role in regional development and job creation. Nevertheless, growth has also exposed challenges related to seasonality, housing pressure in tourist areas, and the need to ensure balanced and sustainable development.

The government, through Turismo de Portugal, has embedded sustainability and skills development at the core of its strategy. The Tourism Strategy 2027 and the Sustainable Tourism Indicators System provide a clear policy architecture for managing tourism's environmental and social impacts.

The creation of Destination Watch, a network of regional observatories, exemplifies a data-driven approach to destination management and workforce planning.

These initiatives reflect Portugal's ambition to become a European leader in sustainable, innovative, and inclusive tourism (see table 5).



Table 5 – Existing policy framework and reforms in Portugal

Policy / Instrument	Lead Body	Period	Key Focus/Description
PENT – National Strategic Plan for Tourism	Ministry of Economy	2007; updated in 2013 and 2017 (Tourism Strategy 2020–2027)	Defines national conditions for tourism sector development over a 10-year period — including education, investment, market segmentation, tourism products, and regional development. Framework aligned with EU Green Agenda, Digital Transition, Pact for Skills, and Recovery and Resilience Plan.
Tourism Strategy 2027 (Estratégia Turismo 2027)	Ministry of Economy / Turismo de Portugal	2017–2027	National roadmap placing sustainability, innovation, and human resources at the core of tourism policy. Promotes sustainable growth, territorial cohesion, qualification of workforce, and digital transformation of tourism businesses
PORUGAL2030 (Community Support Framework)	Ministry of Economy / Turismo de Portugal	2021–2027	EU-funded national framework supporting economic sectors including tourism. Focus on training, innovation, sustainability, and digital transition. Turismo de Portugal acts as intermediary body for tourism funds.
Hotel and Tourism Schools	Turismo de Portugal	Continuous	Provides vocational education and continuous training for tourism professionals across Portugal. Offers



Network (Rede de Escolas de Hotelaria e Turismo)			programs from levels IV-V (VET) up to higher education collaborations. Integrates sustainability, digitalization, and specialization (e.g., wine tourism).
Regional Tourism Entities and Promotion Agencies	Ministry of Economy / Regional Tourism Secretariats (Azores, Madeira)	2007–ongoing	Regional governance and promotion structures coordinating destination management, regional training initiatives, and domestic/international tourism promotion. Established under Law No. 33/2013.
Agenda for Decent Work (Law No. 13/2023)	Ministry of Labour, Solidarity and Social Security	2023–ongoing	Reform of the Labour Code to improve working conditions, combat precariousness, and reconcile work-life balance. Strengthens labour rights in tourism and hospitality sectors.
IEFP Vocational Training Centres	Ministry of Labour, Solidarity and Social Security (IEFP)	Continuous	Provides training and upskilling for active and unemployed workers in tourism. Supports reskilling, lifelong learning, and green/digital transition in hospitality.
Sustainable Indicators Tourism System (SITS)	Turismo de Portugal / OECD cooperation	2023–ongoing	Framework to monitor sustainability performance in tourism through 22 core indicators. Supports evidence-based policymaking and regional observatories

			(Destination Watch Network).
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Slovenia

Slovenia has positioned itself as one of Europe's leading examples of sustainable tourism development. The sector contributes approximately 5% of the national GDP and is characterised by its emphasis on quality, authenticity, and minimal environmental impact.

Although small in scale, Slovenia's tourism system faces similar challenges to its southern neighbours — labour shortages, seasonal fluctuations, and skill mismatches, particularly in digital and green competences.

National strategies adopted since 2022 — including the Slovenian Tourism Strategy 2022–2028, the Digital Transformation Strategy 2022–2026, and the ongoing Slovenia Green certification scheme — form an integrated policy framework that promotes resilience, workforce development, and sustainability.

These measures seek to enhance destination management, support SMEs, and ensure that education and training keep pace with the evolving needs of the tourism labour market. (see table 6)

Table 6 – Existing policy framework and reforms in Slovenia

Policy / Instrument	Lead Body	Period	Key Focus/Description
New Collective Agreement for the Hospitality & Tourism Sector (KPGTS 2024)	Trade Union of Tourism and Hospitality; Employers' Associations; Ministry of Labour	Effective 2025	Collective bargaining agreement improving wages, allowances, working conditions, and rights for hospitality workers; aims to raise job attractiveness and retention.
Act on Amendments to the Employment, Self-employment and Work of	Ministry of Labour, Family, Social Affairs and Equal Opportunities	Adopted 2025	Simplifies hiring and residence procedures for non-EU workers; expands seasonal work in tourism; transposes EU Blue Card Directive; introduces



Foreigners (ZZSDT-E, 2025)			employer and worker protections.
Slovenian Tourism Strategy 2022– 2028	Ministry of the Economy, Tourism and Sport; Slovenian Tourist Board (STB)	2022–2028	National strategy promoting sustainable 'green boutique' tourism, decarbonization, digital transformation, workforce development, and higher value creation.
Slovenia Green – The Green Scheme of Slovenian Tourism	Slovenian Tourist Board (STB)	Ongoing since 2015	Certification program for sustainable destinations and providers; aligns with Green Destinations Standard; promotes environmental, social, and cultural sustainability.
Strategy of Digital Transformation of Slovenian Tourism 2022– 2026	Slovenian Tourist Board (STB)	2022–2026	Horizontal strategy supporting digitalization in tourism; includes initiatives for data- driven management, digital tools, and workforce upskilling.
Skills Anticipation Framework & Skills Forecasting Platform	Ministry of Labour (MDDSZ); Employment Service of Slovenia (ZRSZ); CEDEFOP	2021– ongoing	National forecasting platform to anticipate occupational and skills needs, inform VET planning, and improve alignment between education and labour market.
Promoting Excellence in Vocational	Institute of the Republic of Slovenia for Vocational	2022–2026	EU-funded project to raise VET attractiveness, improve information

Education & Strengthening Cooperation between Education and Labour Market	Education and Training (CPI)		on occupations, and enhance collaboration between schools and employers.
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Spain

Spain's tourism and hospitality sector is both a cornerstone of its economy and a laboratory for social and technological transformation. Contributing over 12% to the national GDP and employing more than three million people, the industry has rebounded strongly after the pandemic.

Yet challenges remain — particularly high levels of job precariousness, reliance on seasonal and migrant labour, and the need to accelerate the green and digital transition.

Spanish reforms have increasingly targeted these weaknesses (see Table 7). National and regional programmes funded through the Recovery and Resilience Plan (RRP) focus on sustainability, digitalisation, and professional development. Initiatives such as the Intelligent Destinations Network, the Tourism Intelligence System, and specific measures for labour-rights protection and training demonstrate a comprehensive policy approach.

Spain's strategy aims not only to enhance competitiveness but also to promote fair employment and resilient, sustainable destinations.

Table 7 – Existing policy framework and reforms in Spain

Policy / Instrument		Lead Body	Period	Key Focus/Description
Sustainable Tourism Strategy – Spain 2030	tourism into a more sustainable, inclusive, resilient, and competitive model aligned	Government of Spain – Secretaría de Estado de Turismo (Ministry of Industry, Trade and Tourism)	2019–2030	Long-term national strategy to transform



<p>with the UN SDGs. Focuses on governance, collaboration, rural development, digital transformation, infrastructure, and workforce upskilling.</p>			
<p>Guía para un turismo sostenible: Retos del sector turístico ante la Agenda 2030</p>	<p>REDS (Spanish Network for Sustainable Development) & Responsible Tourism Institute (RTI)</p>	<p>2019–ongoing</p>	<p>Practical guide for aligning tourism with Agenda 2030 and SDGs. Provides indicators and self-assessment tools for sustainability. Encourages training in sustainable management, ethical practices, and environmental responsibility.</p>

Plan de Impulso para el Sector Turístico: Hacia un Turismo Seguro y Sostenible	Government of Spain – Ministry of Industry, Commerce and Tourism (MINCOTUR)	2020–present	Post-COVID recovery plan focusing on safety, sustainability, and digitalization. Includes financial aid, creation of 'Safe Tourism' certification, and new training programmes with FUNDAE and SEPE to address skill gaps and promote digital competence. Budget: €19.5 billion.	
Plan for the Modernisation and Competitiveness of the Tourism Sector (Component 14 – PRTR)	establishment of the Tourism Competency Framework.	Ministry of Industry, Commerce and Tourism (Secretaría de Estado de Turismo)	2022–2026	Core component of Spain's Recovery Plan. Promotes sustainability, digitalization, competitiveness, and resilience in non-mainland destinations. Budget: €3.9 billion. Includes training for 30,000 workers in green/digital skills and
Recovery, Transformation and Resilience Plan (PRTR)	Government of Spain	2021–2026	National roadmap for post-pandemic recovery aligned with EU's NextGenerationEU. Integrates reforms in education, VET, labour, and tourism. €140	

			billion budget. Emphasizes green and digital transitions, vocational training, and job creation in future-oriented sectors.
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9. Proposed National Policy Reforms and Future Directions

Beyond the ongoing initiatives, all national reports converge toward a common ambition: to build a future-proof, inclusive, and sustainable tourism workforce capable of driving Europe's twin transition — green and digital — while safeguarding cultural identity and social cohesion.

The proposed reforms reflect a deep awareness that the tourism and hospitality sectors, as key pillars of many European economies, cannot rely solely on recovery: they must transform structurally, embracing innovation, sustainability, and human capital development as the foundations of competitiveness.

In Bulgaria, where tourism accounts for almost 7% of GDP and over 360,000 accommodation beds, the post-pandemic rebound has been significant, yet skills shortages and labour mismatches persist. The Bulgarian partners call for a comprehensive national strategy for digitalisation and marketing, supported by advanced labour market forecasting tools capable of anticipating future skill needs. The proposed reforms also prioritise stronger links between vocational training institutions and regional tourism clusters, with an emphasis on dual education models. Bulgaria also recognises the importance of encouraging small and medium-sized enterprises (SMEs) to adopt sustainable business models, particularly through fiscal incentives and access to European and national recovery funds. By aligning education, digitalisation, and sustainability, Bulgaria aims to reposition tourism as a year-round, innovation-driven sector.

Cyprus, where tourism contributes nearly one-fifth of national GDP and employs a highly international workforce, proposes a structural renewal of its human capital system. The creation of a National Tourism Skills Framework would serve as a cornerstone for curriculum reform, certification, and professional progression. Alongside this, Cyprus plans to improve workforce retention through better welfare and working conditions, particularly for seasonal and third-country workers, who now represent nearly half of the sector's employees.

Partnerships between education providers and industry are seen as crucial: flexible upskilling pathways in green and digital competences — especially in digital marketing, water and energy management, and sustainable operations — will be offered through collaborative platforms linking VET schools, universities, and employers. By combining lifelong learning, inclusion, and sustainability, Cyprus seeks to anchor tourism in a more resilient and attractive labour market.

Tourism remains a cornerstone of Greece's economy, contributing €30.2 billion directly to GDP in 2024 (12.7%) and supporting over 401,000 jobs across accommodation and food services. Despite its strategic importance, the sector continues to face persistent labour shortages, with more than 50,000 positions unfilled during peak seasons, alongside widespread reliance on seasonal contracts and a lack of sustainability-related skills.



To address these challenges, the Greek reform agenda aims to transform the existing voucher-based reskilling scheme into a permanent, structured framework embedded within a dual education model that links vocational education and training (VET) institutions with employers. This transition seeks to foster a resilient, skilled, and sustainable tourism workforce aligned with national and EU priorities for the green and digital transitions.

Complementary measures include establishing regional tourism innovation labs to test smart and sustainable solutions, and introducing green certification and leadership programmes for managers. Greece also plans to strengthen monitoring systems to track progress in sustainability—such as reductions in water and energy consumption and improvements in service quality. Together, these initiatives reflect the country's ambition to build a modern, digitally competent, and environmentally conscious workforce.

Italy shares similar concerns about labour shortages and the persistent misalignment between training systems and market needs. Tourism contributes about 13% of Italy's GDP and employs around 1.3 million people, yet job instability and an ageing workforce threaten the sector's vitality. Under the Tourism Strategic Plan 2023–2027 and the National Recovery and Resilience Plan (PNRR), Italy envisions regional pilot programmes linking universities, vocational training centres, and SMEs to foster experimentation in digitalisation, sustainability, and social inclusion. Expanding the Digital Tourism Hub and embedding sustainability and digital literacy into all VET, ITS, and higher education curricula are key priorities.

At the same time, new incentive schemes — including wage-cost reimbursements and training vouchers for companies investing in staff upskilling — aim to promote lifelong learning and improve job quality. By coupling innovation with inclusion, Italy seeks to make tourism a practical laboratory for the green transition and social progress.

In Portugal, the tourism sector—responsible for nearly one-fifth of GDP and over a million jobs—has emerged from the pandemic stronger than before, yet faces the challenge of ensuring sustainable growth. Building on the *Tourism Strategy 2027* and the PENT framework, the government is advancing reforms that link skills development, sustainability, and innovation. Key initiatives include the creation of a **National Green Skills Network**, connecting VET centres, higher education institutions, and enterprises to integrate sustainability competences into all tourism professions, and the expansion of **Destination Watch**, the national network of regional sustainable tourism observatories, to strengthen data on employment, resources, and local well-being.

Among the **proposed reforms**, the government plans to **update vocational and higher education curricula** to include sustainability, digitalisation, and circular economy modules, and to **create certification schemes for green skills and eco-management**, particularly for SMEs. Further measures promote **public–private partnerships** to co-



design training aligned with industry needs, and **reskilling programmes** to equip the workforce with competences in energy efficiency, waste reduction, and sustainable operations. These measures—complementing the modernization of the Tourism and Hospitality Schools Network and regional tourism entities—seek to embed sustainability as both a value and a professional skill, ensuring that Portugal's tourism success is measured not only by visitor numbers but by its contribution to environmental balance, innovation, and community well-being.

Slovenia, which has established itself as a pioneer of green and boutique tourism, is now taking a decisive step toward integrating sustainability into human capital development. With tourism contributing over 5% to GDP and employing around 44,000 people, mostly in small enterprises, the country aims to strengthen green and digital skills across the sector. The proposed national reforms focus on updating vocational education, promoting lifelong learning, and improving working conditions by linking job quality to sustainability goals.

They also encourage closer cooperation between institutions, businesses, and schools, support the digital transformation of SMEs, and reduce regional disparities through local training hubs. Through these measures, Slovenia seeks to consolidate its model of sustainable tourism based on skilled people, innovation, and social inclusion.

Finally, Spain continues to balance growth with social responsibility. Tourism contributes over 12% to national GDP and employs nearly three million people, yet precarious work remains widespread, affecting over 40% of the workforce, especially women and young people. Spanish stakeholders propose a comprehensive reform agenda that combines social, digital, and environmental dimensions. The strengthening of lifelong learning systems for digital and green competences is a key priority, together with the promotion of collective agreements and improved labour standards to reduce precarious employment. Spain also intends to expand its *Smart Destination Network*, financed through the *Next Generation EU* framework, to integrate sustainability and digital intelligence into local governance. Additional initiatives focus on innovation grants for SMEs, renewable energy adoption, and sustainable mobility, while the continued dialogue between workers, employers, and policymakers — exemplified by the “Las Kelly” movement — reinforces the social sustainability of the sector.

10. Policy Recommendations at EU Level

The comparative analysis of the seven partner countries highlights a broad consensus on the need for a coordinated European-level approach to support the transformation of tourism and hospitality.

The common challenges—digitalisation, sustainability, skills shortages, and job insecurity—call for systemic responses and a stronger European policy framework. Below are some strategic recommendations for the European Union and its Member States.

10.1 Aligning Vocational Training with Labour Market Needs

The European Union should foster stronger integration between education systems and the tourism industry by encouraging the co-design of training curricula with enterprises, business associations, and local authorities.

This approach would ensure that vocational education and training (VET) programmes better reflect the sector's actual skill requirements.

Furthermore, the EU should promote the adoption of European competence standards based on micro-credentials and short modular courses, allowing for greater flexibility, cross-border recognition, and continuous professional development. By supporting such a dynamic, demand-driven training model, the aim is to reduce the mismatch between education provision and real labour-market needs—making training systems more responsive, inclusive, and adaptable to the ongoing transformation of the tourism and hospitality sector.

Implementation Pathway:

- Establish EU-wide competence frameworks for green, digital, and soft skills relevant to tourism and hospitality.
- Support co-design of VET and higher education curricula through partnerships between enterprises, VET providers, and regional authorities.
- Introduce a European platform for modular lifelong learning and micro-credential recognition.

Responsible Actors:

European Commission (DG EMPL, DG GROW), CEDEFOP, Member State Ministries of Education, Tourism, and Labour.

Timeline:

Short to medium term (2026–2029).



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the European Union

Indicators:

- % of national curricula aligned with EU competence standards.
- Number of co-developed training programmes with industry involvement.
- Share of workers holding recognised micro-credentials across EU Member States.

10.2 Promoting Large-Scale Digital and Green Reskilling Programmes

The digital and green transitions must be addressed together through large-scale reskilling and upskilling programmes targeting workers, managers, and entrepreneurs in the tourism and hospitality sector.

The European Union, in close synergy with the Pact for Skills for Tourism and Erasmus+, should support transnational vocational training networks that develop advanced competences in areas such as energy management, circular economy, smart tourism, data analytics, and artificial intelligence applied to hospitality. By promoting these joint initiatives, the EU can help accelerate the twin transition of the tourism ecosystem, enhancing the productivity, sustainability, and competitiveness of European tourism enterprises.

Implementation Pathway:

- Launch an EU “Green & Digital Tourism Skills Initiative” under Erasmus+ and the Pact for Skills.
- Establish regional training hubs focused on AI, sustainable operations, circular economy, and smart destination management.
- Prioritise training access for seasonal, part-time, and SME workers, ensuring inclusivity and gender balance.

Responsible Actors:

European Commission (DG EMPL, EACEA), National Labour Ministries, Regional Training Authorities, Industry Associations.

Timeline:

Medium term (2025–2030).

Indicators:

- Number of workers trained through EU-supported reskilling initiatives.
- % of SMEs with at least one employee trained in digital or green skills.
- Measurable reduction in national skills gaps as reported by Eurostat or Cedefop.



10.3 Encouraging Sustainability Certifications and ESG Standards Among Tourism SMEs

Economic and fiscal incentive mechanisms should be introduced to promote the wider adoption of environmental certifications and ESG standards among micro, small, and medium-sized tourism enterprises.

At the European level, successful national initiatives such as Slovenia's Green Scheme and Portugal's Destination Watch observatories could serve as models for a common EU framework to recognise and reward sustainable practices. The European Commission could support the creation of an "EU Sustainable Tourism Label", designed to highlight certified enterprises and integrate them into international promotion and visibility programmes.

The overarching goal is to accelerate the uptake of sustainable business practices and make sustainability a tangible competitive advantage for European SMEs in the tourism and hospitality sector.

Implementation Pathway:

- Introduce tax incentives and financial grants for SMEs obtaining sustainability certifications.
- Develop a unified **EU Sustainable Tourism Label**, integrating national schemes into a shared European framework.
- Include ESG compliance as a criterion in public funding, procurement, and tourism promotion projects.

Responsible Actors:

European Commission (DG ENV, DG GROW), National Tourism Ministries, Chambers of Commerce, ESG Certification Bodies, Industry Associations.

Timeline:

Medium term (2026–2030).

Indicators:

- % of tourism SMEs certified under recognised sustainability or ESG frameworks.
- Number of countries adopting or recognising the EU Sustainable Tourism Label.
- Volume of public funds tied to ESG compliance.

10.4 Enhancing Job Attractiveness Through Competitive Wages and Stable Employment

Improving the attractiveness of tourism-related employment requires concrete action to ensure fair wages, stable contracts, and quality working conditions across the sector.

Many jobs in tourism remain seasonal, low-paid, and insecure, which discourages young people and skilled professionals from entering or staying in the industry.

The European Union, together with national governments and social partners, should encourage collective agreements and sectoral frameworks that promote fair remuneration, longer-term employment, and clearer career pathways.

Such measures would not only reduce staff turnover and labour shortages but also enhance the social sustainability and overall reputation of tourism and hospitality careers.

By making tourism jobs more attractive, stable, and rewarding, Europe can build a motivated, skilled, and proud workforce that contributes to one of its most dynamic and culturally significant sectors.

Implementation Pathway:

- Develop EU guidelines for decent work in tourism (aligned with ILO standards).
- Promote social dialogue and collective bargaining to reduce precarious employment.
- Create “Quality of Work” indicators covering pay equity, contract stability, and career development.

Responsible Actors:

European Commission, National Ministries of Labour, Social Partners (ETUC, HOTREC), Employer Associations, Trade Unions.

Timeline:

Short to medium term (2026–2029).

Indicators:

- % of permanent or long-term contracts in the tourism workforce.
- Gender pay gap reduction in the hospitality sector.
- Employee retention and satisfaction levels (Eurofound / EU Skills Survey)

10.5 Establishing Permanent European Observatories on Tourism Skills

The creation of a Permanent European Observatory on Skills and Social Conditions in Tourism and Hospitality would enable the systematic collection, harmonisation, and sharing of up-to-date data on employment trends, emerging skills, training needs, and the social dynamics of tourism labour markets. This includes monitoring working conditions, gender equality, seasonal employment patterns, job quality, labour mobility, and social inclusion within the sector.

Such an observatory, connected to the European Labour Authority, CEDEFOP, and Eurostat, should operate in close coordination with existing national observatories — such as those in Portugal and Slovenia — providing a robust empirical foundation for European employment, social, and training policies. The ultimate goal is a permanent monitoring system that supports evidence-based decision-making, promotes decent work, and steers long-term sustainable policy strategies for the tourism workforce.

Implementation Pathway

- Establish an EU Observatory on Tourism Skills, Social Conditions, and Sustainability integrated with CEDEFOP, Eurostat, and the European Labour Authority.
- Integrate existing national and regional observatories into a federated European network, ensuring consistent data collection on both skills and social indicators.
- Develop an EU-level, real-time Labour Market Intelligence System using AI, machine learning and big data analytics to continuously monitor tourism employment trends, labour demand and supply, vacancy rates, and emerging skill needs.
- Eurostat now publishes annual and quarterly data on employment for selected tourism industries (e.g. full- and part-time status) via its tourism database, enabling detection of shifts in labour demand (Eurostat, n.d.-a; Eurostat, n.d.-b).
- Eurostat's tourism dashboards and the EU Tourism Dashboard (under DG GROW) visualise key indicators — employment, accommodation metrics, occupancy, demand, and socio-economic variables — providing support for rapid policy reaction (EC Library Guides, n.d.).
- The European Commission's European Capital of Smart Tourism initiative promotes data-driven and innovative urban tourism strategies, illustrating how



analytical tools can inform workforce planning in tourism destinations (ThinkTur, 2025).

- More broadly, research in “smart tourism” shows that big data analytics help understand market dynamics, forecast demand, and align workforce strategies to emerging trends (Xiang & Fesenmaier, 2017; Santarsiero et al., 2024).
- Publish annual **“EU Tourism Skills, Social Conditions, and Sustainability Reports”** to track progress, identify emerging challenges, and guide coordinated policy actions.

Responsible Actors

European Commission (DG EMPL, DG GROW), CEDEFOP, Eurostat, European Labour Authority, National Tourism and Labour Market Agencies, and Social Partners (employers' and workers' organisations).

Timeline

Start in **2026** – ongoing.

Indicators

- Number of countries participating in the EU Observatory network.
- Frequency, timeliness and comprehensiveness of published monitoring reports.
- Number of EU or national policy measures explicitly informed by observatory data.
- Degree of integration of social indicators (e.g. job quality, gender balance, seasonal employment rates, mobility) in observatory outputs.
- Extent of operationalisation of real-time AI-based labour market intelligence tools across Member States.

10.6 Pilot Projects: Integrating Virtual and Augmented Reality in Vocational Training

Several EU initiatives are exploring immersive digital technologies to enhance vocational education and training (VET) in hospitality and tourism. Virtual and augmented reality tools are increasingly recognised as effective in simulating real-world operations, improving learner engagement, and developing green and digital skills (Al-Said et al., 2024; Calisto de Lurdes, 2024).

Virtual Reality (VR) Training modules simulate hotel front-desk operations and restaurant service environments, integrating gamified sustainability tasks to improve environmental awareness and customer service quality (Kumlu, n.d.). Augmented Reality (AR) applications are used in tourism digital skills programmes to



enhance cultural heritage management, eco-tourism awareness, and safety practices (Sandoval, 2024).

Hospitality and tourism schools that have piloted VR-based safety and sustainability training have reported measurable increases in learner engagement, knowledge retention, and skill transfer (Al-Said et al., 2024).

Implementation Pathway

- Launch EU-funded pilot projects integrating VR and AR into VET curricula for tourism and hospitality.
- Collaborate with Erasmus+ Centres of Vocational Excellence to adapt immersive learning modules for multilingual and cross-border use.
- Develop an EU Repository of Immersive Learning Resources accessible to training providers and SMEs.
- Evaluate learning outcomes through comparative studies on engagement, retention, and job readiness.

Responsible Actors

European Commission (DG EMPL, DG GROW, DG EAC), CEDEFOP, Erasmus+, Hospitality and Tourism Schools, Digital Innovation Hubs, and Private EdTech Partners.

Timeline

Start in **2026** – expand from **2028** based on evaluation results.

Indicators

- Number of VET providers adopting VR/AR modules.
- Learner satisfaction and retention rates in immersive training programmes.
- Integration of sustainability competencies in digital simulations.
- Employment outcomes of VR/AR-trained learners.

10.7 Public–Private Co-Creation Ecosystems for Adaptive Skills Development

Collaboration between policymakers, educators, and businesses is essential to developing adaptive, future-ready training ecosystems. These partnerships support skills co-creation, ensuring that vocational curricula stay aligned with rapid technological and environmental transformations in tourism (Siebel & Patuzzi, 2023). Collaborative Platforms linking universities, tourism SMEs, and policymakers enable the co-development of modular curricula combining sustainability, digitalisation, and service innovation.

Smart Tourism Capital Initiatives have demonstrated how multi-stakeholder ecosystems can co-design reskilling pathways aligned with regional tourism development goals (ThinkTur, 2025).



Innovation Hubs and Living Labs also offer valuable models for piloting green and digital skills training, ensuring business-driven curriculum updates and practical applications (Santarsiero et al., 2024).

Implementation Pathway

- Establish Regional Co-Creation Platforms connecting education providers, employers, and public authorities.
- Provide EU innovation funding (via ESF+, Interreg, or Erasmus+) for collaborative curriculum design and pilot programmes.
- Introduce industry mentorship and apprenticeship components for hands-on learning.
- Develop open data platforms for sharing learning outcomes and best practices.

Responsible Actors

European Commission (DG EMPL, DG GROW), CEDEFOP, Regional Development Agencies, Tourism SMEs, Universities, and Social Partners.

Timeline

Start in **2026** – ongoing through **2030**.

Indicators

- Number of operational co-creation platforms established.
- Number of curricula developed collaboratively.
- SME participation in innovation-driven training programmes.
- Volume of learners benefiting from adaptive training initiatives.

10.8 Leveraging Blockchain for Credential Verification and Mobility

Blockchain technology offers secure, transparent, and portable methods for verifying professional skills and qualifications across EU borders. This supports cross-border labour mobility and increases employer trust in verified credentials (Mikroyannidis et al., 2025).

Vocational Education Pilots in the EU are testing blockchain-based digital badges to certify green and digital competencies acquired through work placements and training (Siebel & Patuzzi, 2023).

Such systems also facilitate the mutual recognition of micro-credentials, supporting flexible lifelong learning pathways and faster skills matching (Blockchain Technology in Tourism, 2025).



Implementation Pathway

- Fund blockchain pilot projects issuing verifiable digital credentials for tourism and hospitality VET.
- Align blockchain solutions with the European Digital Credentials for Learning (EDC) framework.
- Promote cross-border recognition through the European Qualifications Framework (EQF).
- Encourage employer and education provider adoption to enhance transparency and mobility.

Responsible Actors

European Commission (DG EMPL, DG CONNECT), CEDEFOP, Erasmus+, National Qualification Authorities, Tourism Employers, and Blockchain Consortia.

Timeline

Start in **2026** – pilots by **2027**, EU-wide scaling by **2030**.

Indicators

- Number of blockchain-backed credentials issued in tourism VET.
- Employer adoption rate of verifiable credentials.
- Participation of Member States in cross-border recognition pilots.
- Reduction in administrative barriers to labour mobility.

10.9 Integrating Worker Well-Being as a Core Indicator of Job Quality

Ensuring worker well-being is central to improving the attractiveness and sustainability of tourism employment. Integrating well-being measures within labour market intelligence enables monitoring of social and economic aspects of job quality (European Commission, 2024).

The EU Skills Survey now incorporates indicators on job satisfaction, work-life balance, and workplace safety (Eurofound, 2023).

Recent tourism workforce studies also include multidimensional indices assessing mental health, job security, and social inclusion (Santarsiero et al., 2024).

Smart Tourism frameworks increasingly recommend longitudinal monitoring of well-being indicators alongside economic performance metrics to ensure a resilient and inclusive labour market (ThinkTur, 2025).

Implementation Pathway

- Integrate well-being indicators into the European Observatory on Tourism Skills and Social Conditions (see section 10.5).
- Align indicators with the EU Social Scoreboard and Decent Work Agenda.



- Develop well-being dashboards combining Eurostat, CEDEFOP, and national data sources.
- Conduct annual well-being assessments for the tourism workforce with policy feedback loops.

Responsible Actors

European Commission (DG EMPL, DG GROW, Eurostat), European Labour Authority, CEDEFOP, Social Partners, and Tourism Associations.

Timeline

Start in **2026** – ongoing.

Indicators

- Inclusion of well-being indicators in EU tourism labour reports.
- Number of Member States collecting comparable well-being data.
- Improvement in job satisfaction, retention, and mental health metrics.
- Policy actions derived from well-being monitoring results.



11. Conclusions

Tourism and hospitality in the GreenHost partner countries continue to represent strategic sectors for economic and social growth, for the creation of qualified employment, and for the enhancement of Europe's natural and cultural heritage. However, these sectors remain structurally vulnerable, exposed to challenges ranging from seasonality to contractual instability, from the mismatch between skill supply and demand to the need to systematically integrate technologies and sustainable practices.

The evidence collected in the seven National Policy Reports reveals a heterogeneous yet converging picture: all countries acknowledge that the future of tourism will depend on their ability to jointly address the twin digital and green transitions and to turn this challenge into an opportunity for economic and social renewal. In this sense, building a European skills ecosystem for tourism becomes a strategic priority — a system capable of integrating labour, education, innovation and sustainability policies, fostering synergies between businesses, institutions, and local communities.

11.1 A strategic sector in transition

European tourism stands at a turning point today. On the one hand, it remains one of the main drivers of the Union's economy, contributing significantly to GDP and employment. On the other hand, the climate crisis, digitalisation, and socio-demographic shifts are redefining its growth models and required skill sets. Emerging trends — from environmental sustainability to experiential tourism, from artificial intelligence to data-driven tourism — call for new professional profiles, new forms of collaboration, and a deep revision of training models. The tourism of the future will increasingly be a knowledge-intensive sector, where the quality of human capital will determine the overall competitiveness of the system.

11.2 Key lessons learned

The comparative analysis highlights several cross-cutting lessons that should guide European and national policies:

1. Skills are the true engine of transformation.

No strategy for digitalisation or sustainability can succeed without a parallel investment in human capital. Continuous training, flexible learning pathways, and the recognition of micro-credentials are central levers to rapidly update the workforce.

2. Sustainability must become an operational principle, not just a narrative.



The cases of Slovenia and Portugal show that integrating environmental and social indicators into tourism planning strengthens both competitiveness and the international reputation of destinations.

3. Innovation is born from collaboration.

Co-design among public bodies, businesses, and training institutions — as seen in the Greek model— creates a lifelong learning ecosystem and accelerates adaptation to market changes.

4. Tourism work must become attractive again.

Adequate wages, stable contractual conditions, and career development opportunities are prerequisites for retaining staff and ensuring service quality. The attractiveness of the sector is an economic, but also a social and cultural issue.

5. Data must guide decisions.

Continuous monitoring, as demonstrated by Bulgaria and Spain, is key to planning effective policies. Permanent observatories on skills and sustainability can provide the empirical foundation for more informed and predictive policymaking.

11.3 Towards an integrated European strategy for tourism skills

The European Strategy for Tourism Skills should serve as a unified framework that connects existing national policies and promotes a shared vision at the continental level.

Such an approach should rest on four fundamental pillars:

1. **Multi-level governance**, integrating the European Commission, Member States, regions, and social partners in the design and implementation of human-capital policies;
2. **European learning ecosystems**, promoting the exchange of good practices, mobility programmes, and mutual recognition of qualifications;
3. **Targeted funding for the twin transition**, through coordinated use of EU instruments (ESF+, ERDF, Erasmus+, Horizon Europe) to support reskilling and sustainable innovation programmes;
4. **Observatories and monitoring tools**, able to measure the impact of policies on skills, employment, and territorial sustainability.

From this perspective, the GreenHost project stands out as a pioneering initiative — a European laboratory of cooperation, learning, and innovation that connects research, education, and policy design.



11.4 The added value of GreenHost

The added value of GreenHost lies in its ability to link local experiences with European strategies, creating a common language among public and private tourism stakeholders.

Through comparative analysis, the project has highlighted not only common challenges but also a shared wealth of knowledge, practices, and tools that can inform future EU policies.

GreenHost demonstrates how tourism can serve as a laboratory for social innovation — a field where sustainability, inclusion, and digitalisation are not slogans but concrete and measurable processes.

Its main contribution has been to place skills at the centre — understood not merely as technical abilities, but as the capacity for adaptation, collaboration, and strategic vision.

11.5 Looking ahead

The future of European tourism will depend on the collective ability to translate policies into concrete practices, strategies into operational tools, and cooperation into tangible results for businesses, workers, and territories.

Building a European ecosystem of tourism skills — green, digital, and inclusive — now stands as one of the most important challenges to ensure long-term competitiveness, sustainability, and social cohesion.

The tourism of the future will not only be an economic sector, but also a cultural and strategic lever for Europe — a domain where innovation, sustainability, and decent work meet to build a more human, resilient, and shared model of development.

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