SUSTAINABLE TOURISM AND POST-COVID ECONOMIC SECURITY POLICIES

TURISM SUSTENABIL ŞI POLITICI DE SECURITATE ECONOMICĂ POST-COVID

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Sumar. *Pandemia de COVID-19 a condus turismul european, în special în ţările din Sud precum Italia, Spania, Grecia, Portugalia şi Croaţia, într-o criză profundă. Acest articol oferă o analiză comparativă a politicilor turistice post-pandemice adoptate atât la nivelul Uniunii Europene, cât şi la nivel naţional, concentrându-se pe rolul acestora în consolidarea sustenabilităţii sectorului şi a securităţii economice. Scopul principal este de a examina modul în care diversele politici şi mecanisme financiare au sprijinit reziliența, modernizarea şi redresarea incluzivă. Metodologia comparativă, care îmbină analiza politicilor şi revizuirea legislativă cu date oficiale şi studii de caz specifice, indică faptul că UE a oferit o direcţie strategică de finanţare, în special prin instrumente precum Mecanismul de Redresare şi Reziliență. În acelaşi timp, statele membre au implementat reforme complementare, de la actualizări legislative la restructurări guvernamentale complexe. Fiecare ţară şi-a adaptat abordarea: Spania a investit masiv în digitalizare, Portugalia a prioritizat dezvoltarea forţei de muncă, Italia s-a concentrat pe consolidarea IMM-urilor, Grecia a îmbunătăţit guvernanţa destinaţiilor, iar Croaţia a implementat reforme legislative structurale. În ciuda acestor strategii naţionale distincte, eforturile lor au condus spre obiective comune: promovarea tranziţiei verzi şi digitale, creşterea incluzivă şi asigurarea securităţii economice pe termen lung a sectorului turistic.*

Cuvinte-cheie: *Turism sustenabil, Securitate economică, Politici post-pandemice, Redresare şi reziliență, Statele din Sudul Europei.*

INTRODUCTION

The COVID-19 pandemic has caused an unprecedented shock to the European tourism sector, drastically reducing tourist arrivals and industry revenues. In the first three quarters of 2020, international arrivals in the EU fell by ~67.5% compared to 2019, with tourism's contribution to EU GDP halving (from ~10% in 2019 to ~5% in 2020) and around 2 million jobs lost. The most affected were the heavily tourism-dependent economies of Southern Europe – such as Italy, Spain, Greece, Portugal and Croatia – which recorded declines in tourism GDP of over 60% in 2020. In this context, the European Union and national governments launched sustainable tourism recovery policies aimed at ensuring the economic security (long-term resilience and competitiveness) of the sec-

tor. This paper provides a comparative analysis of these policies in the post-pandemic period (2020-present), focusing on the EU strategic framework and the regulations adopted in Italy, Spain, Greece, Portugal and Croatia.

RESULTS AND DISCUSSIONS

Tourism is a major economic sector in the EU, and the Treaties give the Union a role in coordinating and supporting Member States' policies (without direct legislative competence in tourism) [1]. However, in recent years, the EU has developed important policies and instruments aimed at making tourism more sustainable, resilient and economically secure [2, 3]. Immediately after the outbreak of the pandemic, the European Commission activated rapid response mechanisms – for example, it temporarily suspended the rules on the use of airport slots, issued guidelines on passenger rights and border control, and co-financed the repatriation of EU citizens stranded abroad. In May 2020, the Commission published its communication "Tourism and transport in 2020 and beyond" (COM(2020)550), with recommendations for the safe resumption of free movement, the gradual reopening of tourism services and financial support measures (e.g. travel vouchers) [1, 2]. The European Parliament supported these efforts by adopting a resolution in June 2020 calling for short- and long-term emergency support for transport and tourism to ensure the sector's survival and competitiveness.

In the medium term, the EU institutions have initiated strategic steps for the green and digital reconstruction of tourism. In March 2021, the European Parliament adopted a resolution calling for an "EU strategy for sustainable tourism", focusing on the post-COVID reconstruction of the sector and its transition to responsible, sustainable and smart tourism [4]. In February 2022, the Commission launched the 'Transition Roadmap for Tourism', part of the EU's updated industrial strategy, which identifies 27 actions for greening/digitising and increasing the resilience of the European tourism industry [5]. Subsequently, in December 2022, the EU Council adopted the European Agenda for Tourism 2030, focusing on green and digital transition, resilience and inclusion, workforce development and an effective governance framework for tourism.

At the EU regulatory level, steps have been taken to support sustainability and competitiveness. For example, in 2022, the Commission proposed an EU system to protect geographical indications for local artisanal products, recognising their role in regional tourism attractiveness – a proposal that was subsequently implemented in Regulation (EU) 2023/2411. In 2024, Regulation (EU) 2024/1028 on the collection of data on short-term tourist rental platforms was adopted to ensure the 'responsible, transparent and fair' growth of this segment, enabling cities to better manage the impact on local communities. The EU has also invested in monitoring tools: since 2022, the European Tourism Scoreboard has been in operation, aggregating relevant statistics and monitoring progress in the green and digital transition of the sector, supporting national and regional decision-makers. The aim is also to improve the database: there is a common framework

for tourism statistics (Reg. 692/2011) and plans for a common European tourism data space to stimulate digital innovation in the field.

From a financial and economic security perspective, the EU has integrated tourism into its main recovery and cohesion instruments [6]. Although there is no line in the multiannual budget dedicated exclusively to tourism, Member States can finance tourism investments through multiple EU programmes. Between 2014 and 2020, 12 programmes were able to finance tourism actions (structural funds, cooperation programmes, etc.), and for 2021-2027 the number has risen to 14, including post-COVID recovery instruments. A new element is that the European Regional Development Fund (ERDF) Regulation 2021–2027 explicitly includes a policy objective on 'sustainable tourism', allowing for the direct funding of such projects [7]. The ERDF has been the main supporter of tourism investments: ~€6.4 billion allocated in 2007–2013 and ~€4.3 billion in 2014–2020 for the development of tourism services, the protection of natural and cultural heritage, and the improvement of tourism infrastructure.

The central instrument for post-pandemic recovery – the Recovery and Resilience Facility (RRF) under NextGenerationEU – gave Member States the opportunity to include investments and reforms dedicated to tourism in their National Recovery and Resilience Plans (NRRPs) [9, 10, 11]. By the end of 2021, 26 out of 27 Member States had submitted their NRRP, and analysis showed that 19 countries (including Italy, Spain, Greece, Portugal, and Croatia) had provided support measures for tourism [7, 8]. For example, Spain has built into its NRRP a comprehensive 'plan for the modernisation and digitalisation of the tourism sector' with a budget of ~€3.4 billion [12, 13]. Croatia has also committed to a comprehensive reform of the tourism sector through its NRRP, aiming to move towards a sustainable and resilient model [14]. This massive European financial support aims not only to return to pre-crisis levels, but also to increase the economic resilience of tourism – i.e. its ability to withstand future shocks (health, economic or geopolitical crises) – through investments in sustainability, innovation and diversification [15].

Overall, post-2020 EU policies focus on: (a) the safe return of tourist mobility (through health coordination and certification), (b) the green and digital transition of tourist destinations and businesses, (c) financial and investment support for modernisation, sustainability and skills, and (d) strengthening governance and data in tourism (monitoring through sustainability indicators, data sharing, coordination between authorities). All of these converge towards the goal of transforming Europe into a more competitive, economically secure (less vulnerable to crises) and sustainable tourism destination [16].

The regulatory, monitoring and financing mechanisms at national and European level that ensure the transition to sustainable and economically secure tourism are:

✓ National strategies and action plans – All five countries have updated or developed medium- to long-term strategies: e.g. Spain's Sustainable Tourism Strategy 2030, Greece's National Pact for Sustainable Tourism 2030, Croatia's Strategy 2030, Portugal's

Turismo +Sustentável 20-23 Plan, Italy's Strategic Plan (implicit in the PNRR). These documents provide soft regulatory frameworks (they are not laws, but guide subsequent policies and legislation) and set objectives, targets and actions. They all align with EU objectives (Green Agenda, Digitalisation, Cohesion) and SDGs, and involve stakeholders (private sector, communities) in their development, which gives them legitimacy and a better chance of successful implementation.

✓ Specific post-pandemic legislation – Some countries have adopted new legislation or amended existing legislation to support new policies. Examples: the 2022 Greek law on MDOs and Destination Observatories; the future Tourism Law in Croatia, which will introduce sustainable monitoring mechanisms; Spain has adopted regulations to control tourist rental accommodation (while also delegating powers to local authorities to limit their number in saturated areas, complementary to the 2024 EU initiative); Italy has reformed the tourist guide regime and introduced tax incentives (e.g. tax credit for hotel renovation). In addition, all countries have temporarily implemented emergency legislation in 2020-2021 (on vouchers, refunds, technical unemployment) to immediately mitigate the economic shock.

✓ Funding through the PNRR (Recovery and Resilience Facility) – The FRR has proven to be an essential funding mechanism. Southern European countries have channelled significant percentages of European grants and loans to tourism: ~€2.4 billion Italy, ~€3.4 billion Spain, substantial funds not explicitly specified but present in the cohesion and culture components for Greece, ~€300 million Croatia directly allocated to the PNRR for tourism reforms and investments (value reconstructed from components), ~€6 billion Portugal (combination of national and EU funds dedicated to the sector). directly allocated in Croatia's PNRR for tourism reforms and investments (value reconstructed from components), ~€6 billion in Portugal (combination of national and EU funds dedicated to the sector). The PNRRs also imposed milestones and targets closely linked to sustainability policies (e.g. adoption of the tourism law in Croatia, creation of Observatories in Greece, completion of X destination sustainability plans in Spain, etc.), ensuring accountability and regular monitoring. At EU level, the Commission verifies the achievement of these milestones before approving payment instalments, which has acted as a strong incentive for reforms.

✓ Structural funds and other EU programmes – In addition to the NRRP, countries are mobilising resources from the ERDF (e.g. through Regional Operational Programmes, which often include priorities for sustainable tourism, tourism infrastructure, and digitalisation), the Cohesion Fund (where eligible, e.g. transport infrastructure to tourist destinations), and the European Social Fund+ (for vocational training in tourism). For example, between 2014 and 2020, Spain made extensive use of the ERDF to modernise destinations, and Portugal used the ESF for employee training (tourism schools under the authority of Turismo de Portugal are co-financed by the ESF). It should be noted that in the new period 2021-2027, the ERDF has a specific objective for sustainable tourism, which further facilitates access to EU funding for such projects – a policy

success resulting in part from the advocacy of Member States with strong tourism sectors.

✓ Monitoring mechanisms and data – A cross-cutting element in all countries is the emphasis on data and indicators to guide decisions. Italy is strengthening its tourism data capacity through its new Observatory and is planning a Tourism Digital Hub; Spain has a system of indicators aligned with the 2030 Agenda and an Observatory for Sustainable Tourism (created in 2021 in collaboration with UNEP and UNWTO); Greece is establishing local Observatories and a national Observatory integrated into the Satellite Account; Portugal has developed a system of regional indicators and a programme called 'TravelBI' that provides real-time market intelligence to tourism stakeholders; Croatia, as mentioned, is working on a sustainable TSA. At EU level, the Tourism Scoreboard and the future European Tourism Data Space will aggregate and compare these national data, enabling benchmarking and highlighting good practices. The UNWTO also supports countries (including Croatia, which signed a research agreement with the Ministry of Tourism and the University of Zagreb in 2021 to advance sustainable tourism) in developing these tools.

✓ Regional cooperation and the exchange of best practices are non-financial yet crucial mechanisms. All these countries participate in European networks. For instance, the European Destinations of Excellence (EDEN) initiative promotes emerging sustainable destinations and includes winners from Spain, Croatia, etc. Other forums include the Organisation for Economic Co-operation and Development (OECD) – which, through its Tourism Trends and Policies 2022 report, offered analyses (cited here as well) and country-specific recommendations – or the European Travel Commission (ETC).

These platforms allow Southern European countries to learn from each other regarding resilient policies. For example, Portugal's implementation of the Clean&Safe label was replicated in Croatia and Italy; Spain and Italy exchange know-how on the digitalization of destinations; Greece and Croatia cooperate within the EU Strategy for the Danube Region and the Adriatic-Ionian Strategy on sustainable tourism sub-objectives. Moreover, the European Parliament has created a working group for tourism within the TRAN Committee, which keeps tourism on the EU agenda and advocates for a dedicated budget chapter. All these are soft governance mechanisms that advance the sustainability and resilience agenda.

In terms of economic security, we observe that these policies targeted two levels: (1) macro-economic security – protecting the sector's contribution to GDP, employment, and tax revenues – and (2) micro-economic security – ensuring income stability for local businesses and households in tourist destinations.

At the macro level, tourism once again became a driver of growth in 2021-2023, contributing substantially to the recovery of Southern economies (for example, the real GDP growth of Greece and Croatia in 2021-2023 was among the highest in the EU, aided by the tourism rebound). At the micro level, many communities dependent on tourism (coastal resorts, agrotourism villages) have benefited from infrastructure investments (roads, modernized utilities through sustainability plans) and new opportunities

(funds for ecotourism start-ups, training for locals). These increase community resilience by providing them with the capacity to withstand seasonal variations or shocks. For instance, a village that attracts tourists in the summer for hiking and in the winter for rural gastronomy, plus has good digital infrastructure for potential digital nomads, will be less affected if one of these streams disappears.

Last but not least, the experience of the COVID crisis strengthened public-private cooperation in tourism. In all these countries, private operators (hoteliers, agencies, transport companies) were consulted in the development of recovery plans and were involved in their implementation (e.g., airlines and ferry companies coordinated relaunch campaigns with governments). This partnership tends to continue: businesses are more likely to accept sustainable regulations if they are part of the solution and see the long-term benefits. This fosters an environment conducive to sustainable development, where the economic security of the sector becomes a common goal.

CONCLUSIONS

In the post-pandemic period of 2020-2025, the European Union and Southern European states initiated a profound transformation of the tourism sector, pivoting from a quantitative, vulnerable model to a qualitative, sustainable, and resilient one. The EU policy framework—including unprecedented strategies, recommendations, and funding through NextGenerationEU—provided the necessary direction and resources. Countries like Italy, Spain, Greece, Portugal, and Croatia adapted these instruments to their specific needs, adopting courageous reforms.

Comparative analysis reveals both convergences and national nuances: all five countries emphasized sustainability (environment, heritage, local communities) and the economic security of tourism (through financial support and diversification). However, each approached priorities differently: Spain invested massively in digitalization and smart destinations; Italy in infrastructure and SME competitiveness; Greece in destination governance and extending the season; Portugal in human resource training and green transition; and Croatia in legislative reforms and territorial tourism management.

The links between EU policies and national regulations are strong. This ranges from the adoption of the European Parliament's 2021 resolution on the EU sustainable tourism strategy (which inspired internal actions) to the conditions of the National Recovery and Resilience Plans (PNRR) that forced the implementation of structural changes (such as the tourism law in Croatia or the operationalization of Destination Management Organizations in Greece). European funding—whether through the Recovery and Resilience Facility (RRF), the European Regional Development Fund (ERDF), or other programs—catalyzed projects that national budgets would have struggled to support individually (e.g., the ~€4 billion invested in tourism sustainability in Spain). This integrated multi-scalar approach (EU + national + local) offers a model of good practice in public policies, demonstrating how a major crisis can be transformed into an opportunity for reform and modernization.

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