



# Partnership Digitalisation and Safety for Tourism

*Thematic Smart Specialisation Platform 'Industry Modernisation'*

## Scoping Note

*ReConfirm*  
19 February 2018

**Lead Regions:** Andalucía (Spain), Lapland (Finland), Slovenia (Slovenia).

**Partner regions:** Castilla y León (Spain), Catalonia (Spain), Valencia (Spain), Lazio (Italy), Tuscany (Italy).

**Lead support:** NECSTouR, The Network of European Regions for Competitive and Sustainable Tourism



# Executive summary

## Tourism is key to the European economy

Tourism is the third most important socio-economic activity in the EU, accounting for 10% of GDP and 12% of total employment. Tourism capital investment in 2016 was 4.9% of total investment. EU is a top world destination; in 2015, over half of all international tourist arrivals was recorded in EU. However, the EU is projected to see slower growth of the tourism sector in the next years.

The industry is facing globalisation and new phenomena: new cultures as customers and entrepreneurs, new legislations, cross-sectoral new products, global threats, climate change to seasonality, accessibility issues, barriers to new investments and new models, etc. Additionally, the tourism industry has been greatly affected by digitalisation and, as it is populated mainly by SMEs, there has is evidence of a gap between the digital readiness level of the companies compared with the clients' expectations. Facing global challenges, tourism SMEs, require support to build resilience and to move to "Exponomy", while investing in sustainability.

Tourism is a place-based activity that includes multi-product areas and serves multi-segment markets. It involves interactions between small product and service providers with large international companies and customers. The complex nature of tourism, its strong inter-sectoral relationships and regional dimension challenge innovation. There is a high potential for innovation between knowledge-intensive industries in the science and technology sectors and less systematically by low-tech industries and services, such as tourism.

Tourism has outstanding resilience compared to other industries and sectors. It sustains gross domestic product in times of economic crisis, compensating for the declining contribution of other sectors.

## Solutions require cross-regional collaboration.

There are common issues impacting the Tourism industry across Europe. The European tourism businesses need to create solutions to address such issues that go beyond their borders. It is thus crucial to link the fragmented potential and solutions developed in Europe and use the available tools and information to create a horizontal answer for the tourism industry.

## Digitalisation and Safety for Tourism Partnership

The mission of the partnership is to provide collaborative solutions to reinforce the regional innovation capacity to facilitate investments based on open innovation infrastructure or new technology by clusters in regional innovation ecosystems. The regions involved will develop investments with strategically chosen key competitive factors: digitalization and safety. The partnership aims to foster a solid European collaboration among the regions to achieve specific transformation goals:

- Build up resilience and innovations through local networking among business, authorities, associations and educational institutions;
- Make better use of digitalization and safety in the development of tourism innovation;
- Support value chains in tourism in terms of investment pipelines and platforms;
- Improve SME's capacity for economic growth;
- Enhance and boost economic and scientific development.

Table 1. Strategic approaches to the role of tourism in smart specialisation strategies.

Approach	Regional Diversity of Tourism	Dimensions Affecting Prioritization of Tourism	Prioritized Area
Diversification across related tourism sub sectors (intra-industry)	concentrated	embeddedness and relatedness	tourism
An enabling platform and a catalyst for diversification of other (non-tourism) sectors	concentrated or diverse	connectedness	tourism and other areas
Diversification across tourism and other sectors (inter-industry)	concentrated	embeddedness and relatedness	tourism and other areas

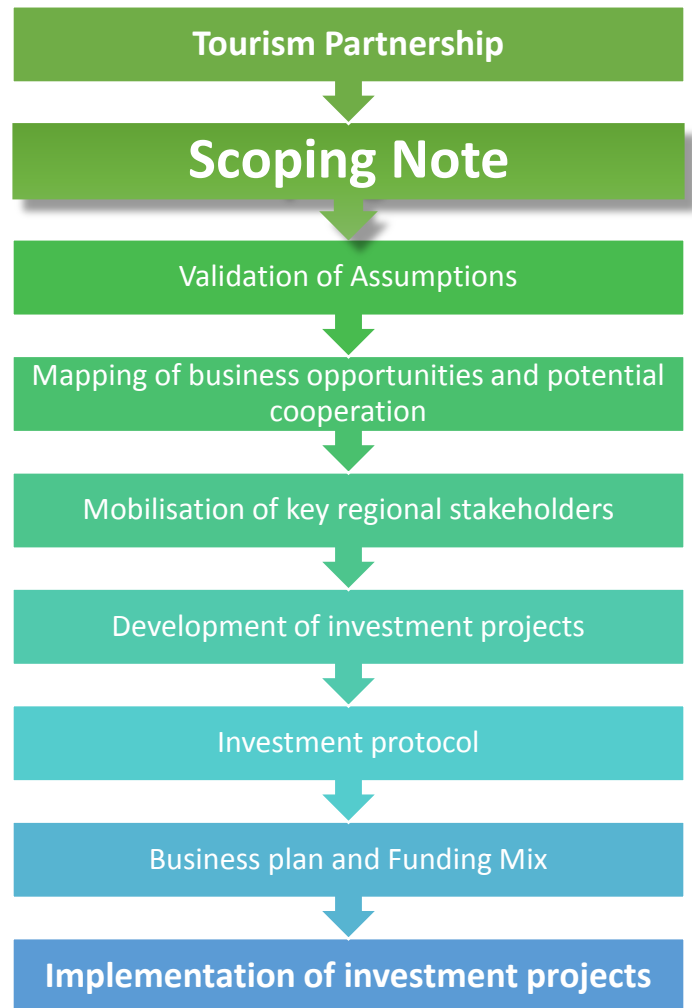
Source: Adi Weidenfeld (2017). *Tourism Diversification and Its Implications for Smart Specialisation*. *Sustainability* 2018, 10(2), 319; doi:10.3390/su10020319

### *The Scoping Note*

This Scoping Note provides a description of the current state of art, the current scoping areas and the agreed next steps towards the finalisation of the investment protocol. It is part of a process that has the goal of implementing investment projects, which is described in the figure below.

The Scoping Note starts with a short overview of the partnership, with summarised information that has been previously collected and analysed. The document then goes on to the definition of the partnership's mission statement, rational and key modus of intervention and operational principles. Based on the discussions and information provided by the partnership, governance principles and operational guidelines are defined. The scoping process takes place, identifying and exploring the cross-regional thematic areas for collaborative investment projects. Finally, the next steps for the partnership are described.

The next step for this partnership will be to validate the ideas developed in the scoping note with the industry.



Process for Digitalisation and Safety for Tourism Partnership

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# Introduction

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The scoping note is aimed at becoming the reference document for the Digitalisation and Safety for Tourism Partnership of the Thematic Smart Specialisation Platform (TSSP) on Industry Modernisation to start the process toward the preparation of the investment protocol(s).

It is divided in the following main sections:

- **Structure of partnership:** this chapter is divided in the following subchapters:
  - **Governance principles:** displays the principles defined by the partnership for organisational purposes.
  - **Operational guidelines:** presents the guidelines, defined by the partnership, for the entire process - from scoping to implementation of investment projects.
  - **Mission statement and rationale:** Presents the key building blocks of the partnership and will be a filter (and/or variable) used to select and organise the upcoming actions.
  - **Scoping:** reviews the different thematic areas targeted by the partnership, and should be the repository of intentions and actions toward each investment project to be implemented in the form of cross-regional collaborations.
- **Next Steps:** this section gathers the key next steps and process milestones applied to the partnership.
- **Overview:** This table summarises the information gathered and analysed from the partnership.

Additionally, as a separate document, there is a section with annexes that include support information for the operationalisation of the investment projects. The annexes include:

- Clusters and initiatives inside and outside the partnership;
- Relevant clusters from the European Cluster Observatory
- EURADA and EBN members
- Partner regions and their RIS3 priorities on tourism
- Regional support instruments - (1) funding opportunities and a combination of regional support capabilities identified in the Solution paper and the Mapping paper, and (2) similar projects or initiatives funded by the EC and investment opportunities.

## Structure of the Partnership

In order to go ahead with successful cross-regional investment projects, the governance principles and operational guidelines must be defined. This chapter aims to provide a coherent and harmonised framework for the development and operationalisation of the investment projects. It also contains the scoping section, where the thematic areas for investment are defined, and the proposed project is described.

### Governance principles

The partnership has defined the following principles for organisational purposes:

- **Leadership.** The lead and co-leading regions of the Digitalisation and Safety partnership are Lapland, Andalucía and Slovenia.
- **Commitment.** Regional commitment is a key pillar of the partnership, and a pre-requisite to any membership. Regional contribution is expected from the Partnership members who expressed their interest but also their commitment.
- **Support.** NECSTouR acts as support structure for the partnership, running the Secretariat and Coordination of the Partnership.
- **Organisational efficiency.** A light structure will be favoured which should rely upon efficient processes and a limitation of possible organisational burdens.
- **Fairness.** Fair and clear decision-making rules will be elaborated in order to allow for proper decisions in case of opposing views.
- **EC consultations/tools.** The involvement of regional stakeholders requires that the partnership keeps up with the momentum created through various consultations with the EC.
- **Action.** The partnership will transform the discussions into implementation through the design of an action Plan, a Communication Plan, and other documents to be agreed upon.



Figure 1 - Governance principles

## Operational guidelines

The partnership has defined several operational guidelines, which will act as guiding principles to the development of investment projects. The operational guidelines have the role of establishing the ideal path to be taken for the successful development and implementation of investment projects for the Digitalisation and Safety partnership.

The following guidelines have been collected from the discussions within the partnership:

- Go beyond “business as usual”
- Engaging stakeholders from all levels of value chain
- Ensure preparation and capacity building
- Leverage on the regional dimension to engage with the international scope
- Consider social entrepreneurship
- Foster cross-regional solutions

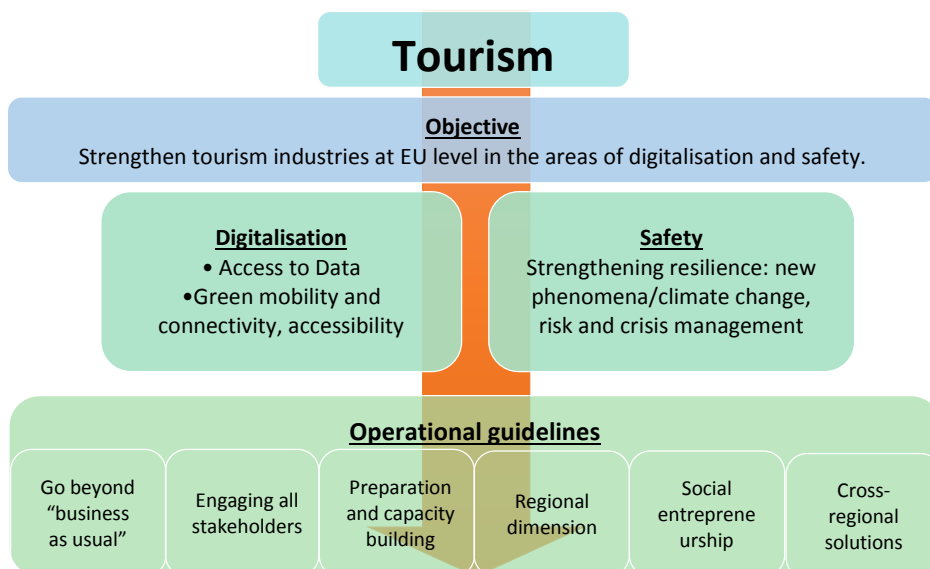


Figure 2 - Operational guidelines



## Mission Statement and rationale

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The partners agreed on a consolidated mission statement for the partnership that can read as follows:

### Partnership's Mission Statement

*To strengthen tourism industries on the EU level, especially in tourism digitalization and tourism safety and to facilitate investments based on open innovation infrastructure of new technology by clusters in regional innovation ecosystems.*

That mission statement is based on a rationale justifying public intervention based on three key elements:

### Partnership's Rationale for public intervention

*Tourism is facing challenges and obstacles in investments on new products, services and premises;  
There is a gap between the digital readiness level of the companies compared with the clients' expectations  
No organisation can manage Safety in tourism alone  
Seasonality of tourism, climate change, demography<sup>1</sup> and other common challenges are affecting tourism.*

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<sup>1</sup> Demographic challenges vary according to different regions: from an overall ageing society, to rural exodus in some regions and differences in population density (can also relate to seasonality).

## Scoping

During the scoping process, cross-regional thematic areas for collaborative investment projects were identified, providing the guidelines for further discussions on the specification of investment opportunities for the Digitalisation and Safety for Tourism Partnership. These discussions were conducted as to define the priorities of the partners in order to establish coherent operational investment projects, departing from the two main themes: Digitalisation and Safety. From these main themes, 6 thematic priority areas were selected, and then syphoned into three overarching thematic areas for investment projects. These are the following<sup>2</sup>:

- Access to data
- Green Mobility, Accessibility and Connectivity
- Resilience, new phenomena/climate change, risk and crisis management

The process followed was the following:

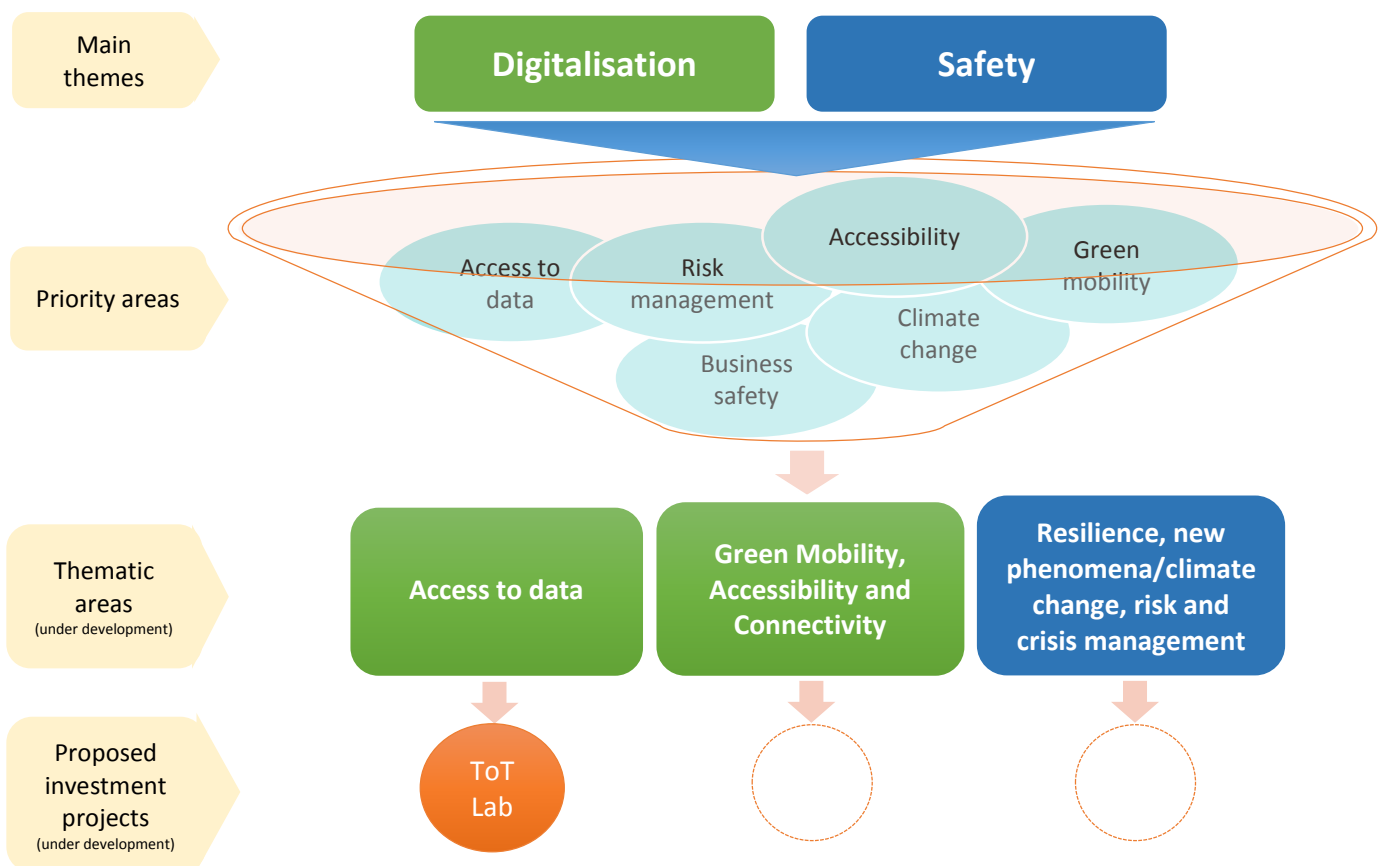


Figure 3 - Scoping process

<sup>2</sup> Under agreement amongst the partnership

## Access to data.

Access to data has been selected as a thematic priority area in the theme of Digitalisation for Tourism in which to focus investment projects.

### Context

Access to data is increasingly relevant to the tourism sector: it allows for the provision of evidence-based decisions and the development and analysis of future scenarios, which infuses the tourism sector with additional efficiency and productivity to face its current challenges. Big data techniques have a special relevance in this sector due to its massive scope.

Data is currently available and used, but has a range of challenges:

- (i) Difficult to compare across regions, and sometimes within an individual region;
- (ii) Level of detail and granularity often not sufficient on which to base decisions and new-product development;
- (iii) Data is sometimes only available at the national (not regional) level;
- (iv) Ownership of data is uncertain and varied – often difficult for data to be shared between public/private sector organizations;
- (v) Available data can be very costly to purchase.

### Objective

An investment project would ideally support collection of data, easing the accessibility, evaluation and use of this information. The relevant tourism data would efficiently help with the management of tourist flows in order to efficiently allocate resources.

It can also be noted that an investment project focused on access to data would be sufficiently horizontal in nature to overcome any issues of heterogeneity in tourism conditions across the partnership regions.

### *Regions' role.*

The current possible leading regions are: Andalucía, Castilla y Leon and Tuscany. The partner regions in the investment project are: Lapland, Lazio, Valencia, Slovenia and Catalonia.

### *Proposed investment project.*

The creation of the Tourism of Tomorrow Lab (ToT Lab). The Lab will be the EU centre gathering research capability, expertise, and data on Tourism.

It will be a physical place, an advanced knowledge centre, a “one stop shop”<sup>3</sup>, which can then gather investments from top companies and leading public organisations in the sector. It will connect private investors' research centres and the business community. It will be co-financed by the institutions and the businesses.

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<sup>3</sup> One-stop shop is a company or a location that offers a multitude of services to a client or a customer.  
Source: <https://www.investopedia.com/terms/o/onestopshop.asp>

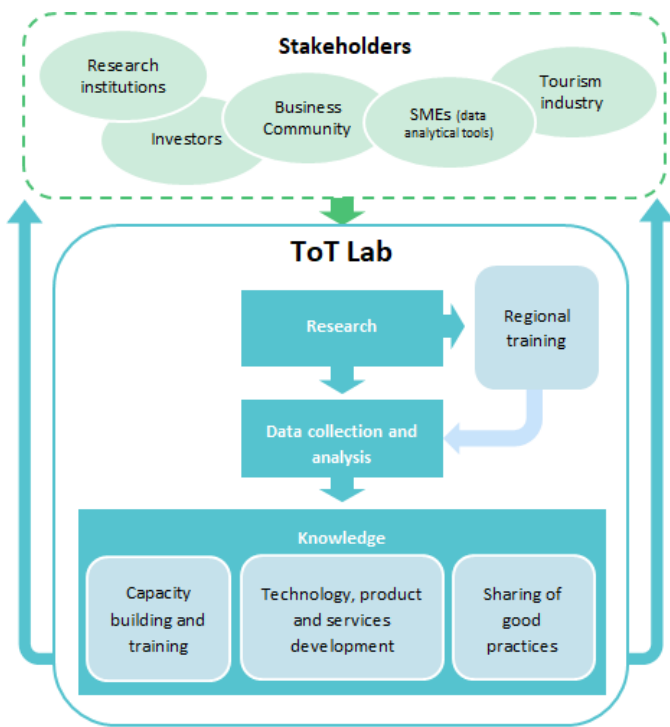


Figure 4 - ToT Lab

The ToT Lab will generate business intelligence and new knowledge to be used by its members at regional level to provide capacity building, training and services in the tourism sector. The knowledge generated by the centre will provide feedback to regional SMEs in terms of technology development, and to universities in terms of training.

Potential sources of data\*

- [Eurostat](#)
- [European Environmental Agency](#)
- [Virtual tourism observatory](#)
- [European Data Portal](#)
- [European Union Open Data Portal](#)
- National and regional data centres
- Private data sources (data owned by private companies, ex. Tourists mobility, preferences, etc.)

### Potential stakeholders.



### Scale up.

The Lab will conglomerate contributions from universities from regions across the EU. Stakeholders, by joining the Lab, will candidate themselves to become points of reference for EU innovation in tourism. Key roles would be played by international organizations such as World Tourism Organization and Eurostat. NECSTouR has an indicator working group already operational. Financial model required to ensure financial sustainability of Lab and regional activities.

The investment structure would be in 2 parts:

- (1) International (e.g. EC, international companies, banking system);
- (2) Regional institutions and private sector operators co-funding for the international dimension and the regional implementations.

### Next steps.

- Validate with opinion leaders from private organisations/companies;
- Define what is offered to the partnership by each region (regional actors);
- Clarify added value of each organisation;
- Identify (1) similar initiatives and (2) target group/early adopters in the involved regions.

## Green Mobility, Accessibility and Connectivity.

Green Mobility, Accessibility and Connectivity have been selected as thematic priority areas in the theme of Digitalisation for Tourism. There is not a proposed investment project for now.

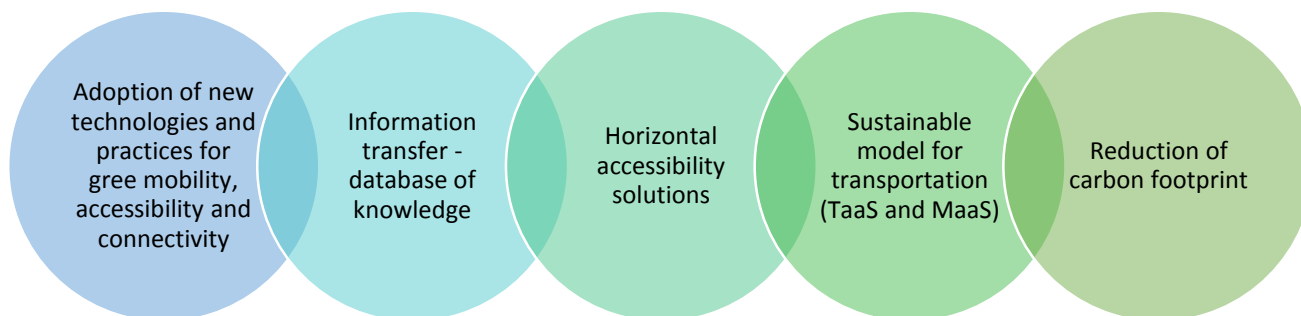
### Context

The regions included in the partnership have a range of geographical features and safety conditions. Hence, a variety of accessibility challenges can form a barrier to safe and flexible journeys. Each region has specific resource requirements (e.g. equipment, know-how) for secure travel. Accessibility should be regarded as the design of products, devices, services or environment for people who experience disabilities.

In addition to accessibility, green mobility and connectivity has been identified as a priority area both to facilitate movement through urban and rural areas, easing the impact of tourism on local traffic, as well as to reduce the effect on climate. With the innovations on electric engines, new models of mobility in tourism can be implemented. Further, during the interviews conducted for the Mapping paper, solutions based on shared economy aspects (use rather than ownership of travel assets) were identified as being important for possible investment projects.

### Objective

The objective is to develop an investment project that increases the adoption of new technologies and practices in the areas of green mobility, accessibility and connectivity of the tourism sector by allowing for information transfer, finding horizontal solutions for accessibility issues, developing a sustainable model for transportation and the reduction of the carbon footprint.



### Regions' Role.

The current possible leading regions are: Lapland, Slovenia (Co-leader).

The partners in the investment project are: Valencia, NECSTour.

## Resilience, new phenomena/climate change, risk and crisis management

Resilience, new phenomena/climate change, risk and crisis management have been selected as thematic priority areas in the theme of Digitalisation for Tourism. This section is under discussion amongst the partnership, thus not a lot of information has been gathered so far.

### *Context*

Safety constitutes a key challenge for the tourism industry and addressing it implies a horizontal strategy. Market operators need business intelligence. The focus of this investment project is thus broader than only safety, as it will be addressing challenges of sustainability, resilience, climate change and risk management.

There is a strong need for tourism related businesses to be able adapt to new phenomena and new business environment and thus enhance the resilience of the tourism industry. This is particularly important for “dying” businesses that have been impacted by these new phenomena and climate change.

## Next steps

ReConfirm has supported the Digitalisation and Safety for Tourism partnership in the process of developing the investment projects, reaching now the level of the Scoping Note. The position of this phase in the overall process is depicted in Figure 5.

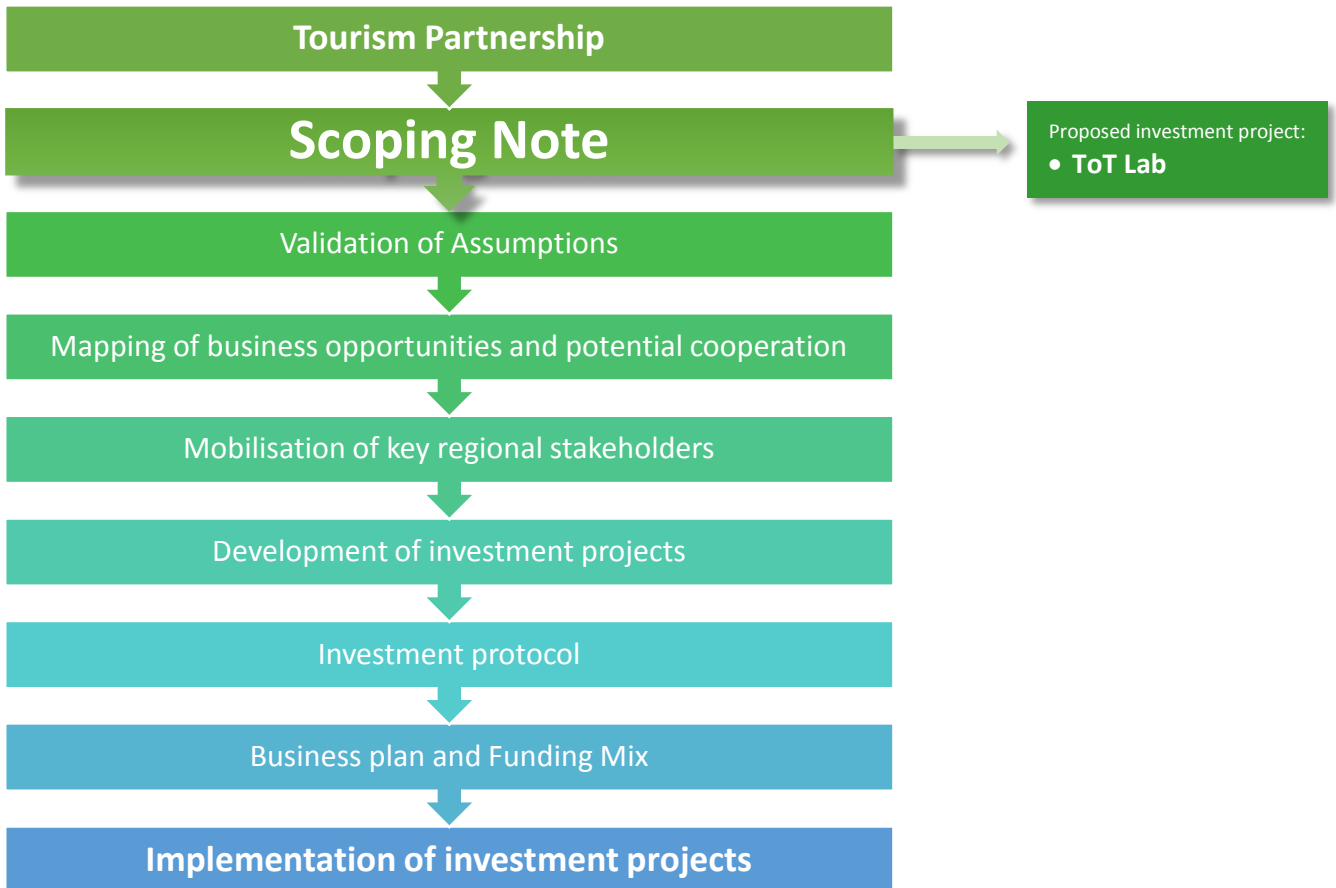


Figure 5 - Process for Digitalisation and Safety for Tourism Partnership

The following time-table, presented in Table 1, was agreed upon by the partners and sets the milestones for the partnership to move forward between February and April 2018:

Table 1 - Action Plan until 04/2018

Date	Description of activities
12-16/02	Scoping note finalized. Investment protocol delivered by Reconfirm.
22/02	European Industry Week: Local event on tourism organised by the Partnership and “Investing in the European Tourism of Tomorrow” Tourism Stakeholder Workshop in the afternoon supported by ReConfirm project
08/03	Cluster call deadline.
10/04	Strategic Workshop in Lapland followed by the Internal meeting of the Partnership in order to discuss the results of the Workshop as well as the next steps.
11-13/04	Participation to the Interreg Europe and S3 Steering Group meetings in Lapland. Wrap up Partnership meeting on the last day of the event.
12/04	Innosup call, Cluster facilitated projects for new industrial value chains, deadline stage 1

## Overview

This section presents an overview of the current state of the partnership, based on the assessment of the information made available in the Expression of Interest (Eoi), in the documentation made available by the partner regions, the interviews with the representatives of each region, the analysis developed under the Mapping Paper and further meetings among the partnership. Below, a summary of the collected and analysed information:

Table 2 - Overview of the partnership's state of the art

Partnership		Digitalisation and Safety for Tourism
<b>Lead and Co-leading Regions</b>		<ul style="list-style-type: none"> <li>• <b>Lapland:</b> Lapland University of Applied Sciences, Multidimensional Tourism Institute</li> <li>• <b>Andalucía:</b> Junta de Andalucía</li> <li>• <b>Slovenia:</b> Slovenian Chamber of Hospitality and Tourism</li> </ul>
<b>Geographical coverage and respective representatives</b>	<b>Participating Regions<sup>4</sup></b>	<ul style="list-style-type: none"> <li>• <b>Castilla y Leon:</b> Fundación Santa María la Real del Patrimonio Histórico</li> <li>• <b>Catalonia:</b> Directorate General for Tourism</li> <li>• <b>Valencia:</b> Agència Valenciana del Turisme, Invattur (Instituto Valenciano de Tecnologías Turísticas)</li> <li>• <b>Lazio:</b> Agenzia Regionale del Turismo</li> <li>• <b>Tuscany:</b> Economic Promotion and Tourism Department, Regional Government of Tuscany</li> <li>• <b>NECSTouR</b> (Network of European Regions for Competitive and Sustainable Tourism) – <u>not a region</u></li> </ul>
<b>Links with RIS3</b>		<ul style="list-style-type: none"> <li>• <b>Lapland:</b> Tourism Safety (under Arctic Safety)</li> <li>• <b>Andalucía:</b> Innovation and tourism (Tourism and Digitalization are included in order to enhance the territorial heritage resources)</li> <li>• <b>Slovenia:</b> Digitalization and Safety integral part of the S3 initiative in Tourism ( Safety is related to special area "smart cities"); Sustainable Tourism and Creative Cultural and Heritage based Services</li> <li>• <b>Castilla y Leon:</b> Tourism, heritage and Spanish language</li> <li>• <b>Catalonia:</b> Innovation, sustainability, demographic changes in society, safety, sharing economy and governance issues; Cultural and Experience Based Industries.</li> <li>• <b>Valencia:</b> Tourism and quality of life - No seasonal, health, efficient and quality tourism services.</li> <li>• <b>Lazio:</b> Agri-Food: a transversal sector - with links to both high-tech (i.e. biotechnology) and low-tech industries (i.e. tourism).</li> <li>• <b>Tuscany:</b> Innovation and digitalization of tourism.</li> </ul>

<sup>4</sup> The region of Navarra will be contacted for possible participation in the partnership



<b>Mission Statement, rationale &amp; key modus of intervention</b>	<p><b>Partnership’s Mission Statement</b> To strengthen tourism industries on the EU level, especially in tourism digitalization and tourism safety and to facilitate investments based on open innovation infrastructure of new technology by clusters in regional innovation ecosystems.</p> <p><b>Partnership’s Rationale for public intervention</b></p> <ul style="list-style-type: none"> <li>• <i>Tourism is facing challenges and obstacles in investments on new products, services and premises;</i></li> <li>• <i>There is a gap between the digital readiness level of the companies compared with the clients’ expectations</i></li> <li>• <i>No organisation can manage Safety in tourism alone;</i></li> <li>• <i>Seasonality of tourism, climate change, demography and other common challenges are affecting tourism</i></li> </ul>
<b>Governance principles</b>	<ul style="list-style-type: none"> <li>• Leadership.</li> <li>• Commitment.</li> <li>• Support.</li> <li>• Organisational efficiency.</li> <li>• Fairness.</li> <li>• EC consultations/tools.</li> <li>• Action.</li> </ul>
<b>Operational guidelines</b>	<ul style="list-style-type: none"> <li>• Go beyond “business as usual”</li> <li>• Engaging stakeholders from all levels of value chain</li> <li>• Ensure preparation and capacity building</li> <li>• Leverage on the regional dimension to engage with the international scope</li> <li>• Consider social entrepreneurship</li> <li>• Foster cross-regional solutions</li> </ul>
<b>Thematic priority areas</b>	<p><b>Digitalisation</b></p> <ul style="list-style-type: none"> <li>• Access to Data: Tourism of Tomorrow Lab (ToT Lab): A Lab that will be the EU centre gathering research capability, expertise, and data on Tourism.</li> <li>• Green mobility and connectivity, accessibility</li> </ul> <p><b>Safety</b></p> <ul style="list-style-type: none"> <li>• Strengthening resilience: new phenomena/climate change, risk and crisis management</li> </ul>
<b>Expansion of the partnership</b>	<p>The partnership can be expanded in terms of clusters, regions and companies/organisations. Examples are shown in Annexes 1, 2 and 3.</p>