Project Brief

Europe's invisible export

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Brussels, November 2026
Project Brief

EUROPEAN TRAVEL COMMISSION

Project Brief
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1. Introduction

The European Travel Commission (ETC) is looking for a research partner, or a team combining economic research and data design, to bring together the evidence on what tourism contributes to Europe and its countries, and to present it in 36 reports: one for each ETC member country and two overviews. The reports will be launched at ITB Berlin on 16 to 18 March 2027.

The present document is intended as a guideline based on ETC's goals and requirements. A clear understanding of these goals and requirements should be reflected in the proposal. Applicants are asked to interpret all aspects of this document carefully yet creatively, using their expertise to propose the best possible solution for the project. The brief sets out what ETC needs, the deadlines and the principles the work must follow. It deliberately leaves the choice of indicators, the format and the features of the reports to applicants. Additional ideas and suggestions that contribute to the objectives of the project are welcome and should be clearly outlined in the proposal.

The information in this document may not be used for any purpose other than to respond to this Project Brief. This document is and will remain at all times the property of ETC.

About the European Travel Commission (ETC)

The European Travel Commission is an international non-profit association of the official National Tourism Organisations (NTOs) of 34 European countries. It was established in 1948 and is headquartered in Brussels, Belgium.

ETC empowers its members, stakeholders and the wider industry to shape the future of tourism in Europe for the benefit of all. It offers its members services in knowledge sharing, destination marketing and advocacy, and fosters collaboration and the exchange of best practices. ETC is established as a private non-profit association (AISBL) under Belgian law.

Further information about ETC can be found at etc-corporate.org.

2. Information about the project

2.1 Short description

ETC intends to commission the compilation of evidence on tourism's contribution to the economy, society and the environment, and the production of 36 reports under the title “Europe's invisible export”.

Tourism is one of the few industries in which Europe leads the world. It earns foreign revenue at home, employs people in every region and helps fund the heritage and nature that visitors come to see. The evidence exists, but it is spread across many sources and rarely brought together in a form policymakers read.

The EU Sustainable Tourism Strategy, adopted in November 2026, commits the European Commission to a stronger assessment of tourism's economic and social impact, including in the European Semester. 2027 is also the UN International Year of Sustainable and Resilient Tourism. ETC wants to use this moment to show, country by country, what tourism contributes today.

The economy is the core. Society and the environment are covered wherever the evidence is solid. ETC is not looking for a compilation of the usual statistics. It wants a partner who brings the standard figures together and then looks further, using new data sources and fresh indicators to show tourism's value in ways policymakers have not seen before.

Nor does ETC want to repeat work that already exists. Estimates of tourism's economic contribution by country are already published, for example in the World Travel & Tourism Council's (WTTC) Travel & Tourism Economic Impact research for 2026, which covers tourism's share of GDP, jobs, visitor spending and investment, with forecasts to 2036, and in the European Commission's EU Tourism Dashboard. The country reports may draw on these sources and should not contradict them without explanation, but their value lies in what these sources do not show.

The concept note in Annex 1 sets out the purpose, examples of indicators, both standard and exploratory, and an illustrative page layout. It is a starting point, not a specification, and ETC expects applicants to improve on it. Where the annex and this brief differ, this brief applies.

Several ETC associate members hold data that could be relevant, for example on card spending, bookings, rail travel and tax-free shopping. ETC can ask them to contribute such data to the project free of charge. Applicants are therefore asked to identify in their proposal which associate member data would be useful, what each dataset would be used for and which countries and years it should cover, so that ETC can approach the associate members concerned before the project starts. ETC cannot guarantee that the data will be made available, so for each dataset the proposal should also say how the indicator would be handled without it. Data contributed by associate members will be credited in the reports.

2.2 Objectives

The purpose of the project is to:

- bring together, for each country, sourced and consistent evidence on tourism's contribution to the economy and, where the data allow, to society and the environment;

- test new indicators that go beyond official statistics, such as card spending, mobile phone or online job advertisement data;
- give each ETC member a national evidence base for its discussions with ministries, including in the European Semester and the National and Regional Partnership Plans of the next EU budget;
- set up a format that can be updated every year, so that 2027 becomes the first edition of a series.

2.3 Target groups

The country reports are aimed at:

- policymakers in the EU institutions and in national ministries, in particular those working on economic policy, the European Semester and EU funding;
- ETC members and their national partners, who will use the reports in national policy and budget discussions;
- the media, industry and the wider tourism community.

The reports should be quick to read for a non-specialist, while every figure can be traced back to its source.

3. Requirements and deliverables

Proposals which are not compliant with the requirements below will be excluded from further evaluation.

This section describes what ETC needs and by when. How the reports look and work, and which indicators they use, is for applicants to propose.

3.1 Deliverables

Scope

Thirty-six reports, available online and in a printable version. As a baseline, ETC expects one page or one screen per country; applicants may propose more if the budget allows. The reports are:

- an EU overview aggregating the 27 EU Member States;
- an ETC overview aggregating the 34 ETC member countries;
- a report for each ETC member country (34 in total).

Sweden is an EU Member State but not an ETC member. Its data are included in the EU overview so that the EU aggregate is complete, but no separate report is produced for Sweden.

Reports for some countries may carry fewer indicators where official data are limited. Gaps should be shown, not filled with estimates.

What ETC leaves to applicants

ETC does not prescribe the indicators, the format or the features of the reports. Applicants are asked to propose:

- **the indicators**: which figures best show what tourism contributes to the economy and, where data allow, to society and the environment. ETC expects a mix of consistent figures for every country and new indicators that go beyond official statistics, but the choice and the balance are left to the applicant;

- **the format**: length, structure and layout of the reports, and how the online and printable versions relate to each other;
- **the features**: what readers can do with the reports online, for example exploring sources or downloading data;
- **the design and tools**: visual approach and the technology used to build and update the reports.

The concept note sets out ETC's current thinking on all four, and applicants are free to depart from it if they can make a better case.

Main stages of work

The work is likely to include the following stages. Applicants may organise it differently.

Inception. The contractor reviews existing publications on tourism's contribution so that the reports add to them rather than repeat them. It refines the indicators, format and features set out in its proposal, tests the feasibility, country coverage, reliability and cost of any new indicators, takes into account the associate member data ETC has been able to secure, and agrees the final approach with ETC.

Data collection and processing. The contractor collects, checks and harmonises the data, and records the source, definition and reference year of every figure. Headline figures on tourism's share of the economy should be consistent with the definitions used in the EU Sustainable Tourism Strategy, so that the EU overview matches the Commission's figures.

Analysis and writing. The contractor writes the text of the reports and a method note explaining definitions, sources, years and limits. The tone is positive, evidence-led and free of jargon. Language: British English.

Design and build. The contractor designs and builds the reports in the format it has proposed, online and in a printable version.

Member review. The contractor prepares a data sheet and draft report for each country. ETC collects and consolidates members' comments; comments received after the review period will not be included. The contractor then processes the corrections and explains any it cannot accept, and ETC settles any disagreement. ETC manages contact with members; the contractor handles the content.

Launch support and handover. The contractor provides the headline figures and visuals and checks the figures in the press release. It hands over the reports, data and source files so that ETC can host them and update them in future years; proposals should explain what hosting and maintenance would involve. The contractor remains available for corrections during launch week and, until 31 December 2027, corrects any errors attributable to it.

Optional: 2028 update. Applicants are asked to price separately a data refresh of all reports in early 2028.

Deliverables and deadlines

The schedule works back from the ITB launch. Applicants should confirm it in their proposal or propose a realistic alternative that still meets the launch date.

Deliverable	Due
Kick-off meeting (online)	Week of 14 December 2026
D1. Inception report: agreed indicators, data availability by country, data plan, format and design concept	13 January 2027
D2. Prototype: EU overview and three pilot countries	22 January 2027
D3. Draft reports and data sheets for all countries, ready for member review	5 February 2027
Member review (managed by ETC)	5 to 19 February 2027
D4. Final reports (online and printable), method note, full dataset, handover	5 March 2027
D5. Launch material: headline figures and visuals	9 March 2027
Launch at ITB Berlin; contractor available for corrections	16 to 18 March 2027
Correction of errors attributable to the contractor	Until 31 December 2027

3.2 Minimum requirements

- **Independence.** The figures are the contractor's. ETC sets the scope and the tone, but will not ask the contractor to change a figure the evidence does not support.
- **Sourcing.** No figure without a source and a year. Modelled, commercial or experimental figures are labelled. Where countries measure differently, the report says so.
- **No country comparisons.** The reports present each country on its own. They do not rank countries or compare them with one another. A country's figures may be set against the EU or ETC total.
- **Added value.** The reports must add to existing publications, not repeat them. For each proposed indicator, the proposal should state whether it is already published elsewhere and, if so, what the new version adds.
- **New data.** Proposals must include data beyond official statistics and explain what would be used, where it comes from, what it costs and what it adds.
- **Data licences.** Any data the contractor buys must allow ETC to publish the resulting figures in the reports and in press and campaign material. Licence costs fall within the maximum budget and must be broken down source by source in the economic offer (see section 4).
- **Partner data.** ETC may provide data from its associate members. These are credited in the reports and checked like any other source.
- **Experience.** Proven experience with official tourism or economic statistics, ideally including the EU Tourism Dashboard and the Commission's methods, and with interactive data publications.

3.3 Technical requirements

Whatever format and tools are proposed, the reports should:

- work well on mobile and in current browsers, and print cleanly;
- meet WCAG 2.1 AA accessibility, including text alternatives for charts;
- be easy to embed in or link from TourismforEurope.eu, etc-corporate.org and members' websites;
- be updatable each year without rebuilding them from scratch;use no tracking cookies.

Applicants should state any licence, platform or hosting costs ETC would carry after the contract ends.

Style

All deliverables need to follow ETC's visual identity, which will be supplied at kick-off. Data partners are credited in the reports where their data are used.

Assignment of rights

ETC owns the reports, source code, designs, texts and compiled dataset produced for this project, subject to any third-party data licences, and may publish them under an open licence. ETC and its members can use, adapt and republish them. The contractor may show the work in its portfolio.

For any pre-existing material or tools that the contractor incorporates in the deliverables, the contractor shall provide ETC with a worldwide, royalty-free, non-exclusive, perpetual (for the duration of the applicable copyright) licence:

a) to reproduce the material or incorporate it into other material, and to reproduce it as incorporated in such other material;

b) to create and reproduce derivative works from the material;

c) to distribute copies and display the material publicly, whether independently or as part of other material;

d) to distribute copies and display publicly derivative works from the material.

Reporting

The contractor will hold a short online progress call with ETC every two weeks and confirm progress in writing at each deliverable. Any risk to the schedule must be flagged as soon as it appears.

Implementation period

The project is expected to start in December 2026, with the kick-off in the week of 14 December. The main deliverables are due by 9 March 2027, and the contract shall not extend beyond 31/12/2027.

4. Budget and terms of payment

The maximum available budget for this project is **25,000 EUR** (excluding VAT and including all other taxes, costs, fees, data licences and expenses). Offers above this amount will not be considered.

Applicants should break down their price by stage of work and show day rates and days per team member. For every additional data source proposed beyond open official statistics, the offer should give a separate line showing the source and provider, the indicators it feeds, the countries it covers, its cost and the licence terms. If a source could come free of charge from an ETC associate member or another partner, the offer should say so.

The optional 2028 update should be priced separately; it does not count towards the maximum budget.

Invoicing will be done in two instalments after submission of deliverables: 50% on approval of the inception report (D1), and 50% on final delivery (D4 and D5). ETC will first approve that the deliverables are correct and then ask the contractor to submit an invoice.

The payment from ETC to the contractor may be reduced in the event of any breach of the contractor's obligations. Breaches may include, but are not limited to, failure to deliver the required deliverables, missing the agreed deadlines, or errors in figures that are not corrected.

5. Submission of proposals

Proposals must be clear, concise (not exceeding 10 pages, plus CVs and annexes) and written in English, so there can be no doubt as to word meaning and figures. They should be sent as one PDF.

Each economic operator shall submit only **one proposal** per Project Brief. Consortia are welcome, with one lead partner who signs the contract. Any subcontractors must be named.

Proposals should include:

1) **Company profile**, and for consortia, the role of each partner.
2) **Indicators**: the proposed indicators, including at least five that go beyond current official statistics. For each new indicator, the proposal should state what it shows, where the data would come from, which countries it could cover and what it would cost, and explain what the indicator set adds to existing work. ETC considers this the most important part of the proposal.
3) **Associate member data**: the data from ETC associate members that would be useful for the proposed indicators, with, for each dataset, the type of data, what it would be used for, the countries and years needed, and how the indicator would be handled if the data are not made available. ETC will use this list to request the data from its associate members.
4) **Approach**: how the applicant will compile and harmonise the data and handle gaps and differences between countries.
5) **Data test for one country**: for one of France, Estonia or Serbia (at the applicant’s choice), the five indicators the applicant considers most relevant, with their (optional: values), source and year, illustrating both standard figures and more creative angles that show tourism’s value in a new way.
6) **Format and features**: how the reports would look and work, online and in print, with links to two or three examples of comparable data work. A sketch or mock-up of one country report is welcome but optional.
7) **Team**: who does what, with CVs (two pages each) and days per person.

8) **Work plan**: how the applicant will meet the schedule in section 3.1, including over the holiday period.
9) **Economic offer**, as set out in section 4. All prices should be quoted in euro and exclude VAT (ETC being a VAT-registered entity based in Belgium) and include any other taxes if applicable. The offer should include all costs within the scope of work, including third-party costs and data licences. Any item essential for the smooth running of the project, as indicated in this document, shall be read as included even if not specified.

Project Manager:

Mrs Teodora Marinska, Chief Operating Officer, ETC Executive Unit, Brussels: teodora.marinska@visiteurope.com

Use of Artificial Intelligence

The contractor is allowed to use Artificial Intelligence (AI) in both the preparation of the proposal and, if awarded, the execution of the project. However, any use of AI must be clearly disclosed as part of the proposal submission. This disclosure must include:

- a description of the AI tools or technologies used or intended to be used;
- identification of the specific areas of the proposal where AI was applied;
- a preliminary outline of the tasks, processes or deliverables during contract execution where AI is expected to be used.

Deadline for submission

Proposals must be sent by email to Mrs Teodora Marinska (teodora.marinska@visiteurope.com) with the subject line “Project Brief Europe's invisible export: [name of organisation]”.

Proposals must be received by **02/12/2026 at 12:00 (CET)**.

The proposals must be valid for at least three months after the submission deadline.

Questions

Questions can be sent in writing to the Project Manager listed above, with the subject “Europe's invisible export”, until **25/11/2026 at 14:00 (CET)**.

ETC will share anonymised answers to all questions received with everyone who has asked or registered interest by **26/11/2026 at 22:00 (CET)** at the latest.

Timetable

Step	Date
Project Brief published	19 November 2026
Last day for questions	25 November 2026, 14:00 CET
Answers shared with all applicants	26 November 2026, 22:00 CET
Deadline for proposals	2 December 2026, 12:00 CET
Decision and contract	By 11 December 2026
Kick-off	Week of 14 December 2026

6. Award criteria

The contract will be awarded to the most economically advantageous proposal, meaning the one that offers the best value for money: 70 points for quality and 30 for price. Proposals must also comply with the requirements set out in this document.

Criterion	Points
Originality, relevance and feasibility of the proposed indicators, and what they add to existing publications	25
Approach and method	15
Data knowledge, including the data test	10
Proposed format, design and features, based on the examples and any mock-up provided	10
Team and relevant experience in comparable work	10
Price (lowest offer receives 30; others: lowest price ÷ offer price × 30)	30
Total	**100**

Proposals scoring below 42 of the 70 quality points will not be considered further, whatever their price. The decision will be based on the written proposals; there will be no interviews.

If two proposals receive identical scores following individual reviews, the contract will be awarded to the proposal with the lowest price.

7. Final provisions

This Project Brief is in no way binding on the European Travel Commission. Any contractual obligation commences only upon signature of a service contract between ETC and the contractor, governed by Belgian law.

ETC reserves the right to accept or reject any or all proposals received as a result of this Project Brief, to award only part of the project, or to cancel the project, either partially or totally. Cancellation does not entail any financial obligation from ETC towards any applicant. Applicants bear their own costs of preparing a proposal.

Submission of a proposal implies acceptance of the terms and conditions set out in this document.

ETC thanks all applicants in advance for their time and interest in this project.

Brussels, 19/11/2026

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Annex

Annex 1 – Concept note: What tourism gives Europe (November 2026)

European Travel Commission

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EUROPEAN
TRAVEL
COMMISSION

Europe's invisible export

Annex 1 – Concept note: What tourism gives Europe (November 2026)

Background

Tourism is one of the few industries in which Europe leads the world. It earns foreign revenue without shipping anything abroad, because the customer comes to the product. It employs people in every region, including places with few other industries. And in many destinations, it helps pay for the heritage and nature that visitors come to see.

The evidence is scattered across statistical offices, international organisations and industry, and it rarely reaches the people who set economic priorities. The figures that do circulate are the familiar ones: share of GDP, number of jobs, arrivals. They are useful, but they do not show the full picture of what tourism does for a country and the people who live there.

The EU Sustainable Tourism Strategy, adopted in November 2026, gives this research project a mandate. The Strategy calls tourism a strategic asset for Europe's competitiveness and a key export sector, earning 11% of EU services exports. It also commits the Commission to a stronger assessment of tourism's economic and social impacts in the European Semester, including the Country Reports. This process needs national evidence of exactly the kind this project will produce.

Purpose

This project shows what tourism contributes to the economy and to people's well-being in each ETC member country today. The economy comes first. Society and the environment follow wherever the evidence is solid.

ETC wants more than a compilation of existing statistics, and does not want to repeat what is already published, such as WTTC's Travel & Tourism Economic Impact research. It needs a partner who will bring the standard figures together and then look further: new data sources, new angles and indicators that show tourism's value in ways policymakers have not seen before.

What the project will produce

Thirty-six reports, available online and in a printable version: an EU overview of the 27 EU Member States, an ETC overview of the 34 ETC member countries, and a report for each ETC member country, covering the 26 members in the EU and the 8 outside it (Iceland, Monaco, Montenegro, Norway, San Marino, Serbia, Switzerland and Ukraine). Sweden is not an ETC member: its data are included in the EU overview, but it does not get a separate report. The reports will be launched at ITB Berlin on 16 to 18 March 2027 and then used in ETC's Brussels policy dialogues, the Tourism for Europe campaign and members' national policy work, including the European Semester and the National and Regional Partnership Plans of the next EU budget.

What to measure

Choosing the right indicators is a key part of the job. The examples below show the kind of evidence ETC has in mind. The partner is expected to test them, drop what does not work and propose better ones.

The essentials

Every report needs a small set of standard, consistent figures, mostly from official statistics (Eurostat, national tourism satellite accounts, central banks, OECD, UN Tourism, and the Commission's EU Tourism Dashboard). For example:

- **Economy**: tourism's direct and total share of GDP; export earnings from visitors; number of tourism businesses and the share that are SMEs; investment; reliance on the top three source markets.
- **Society**: tourism jobs and their share of all jobs; jobs held by women and young people; how jobs and income spread across regions; seasonality.
- **Environment**, where reliable data exists: tourism in and around Natura 2000 and other protected areas (the Commission's recent guidance on Natura 2000 and sustainable tourism is a reference); heritage sites and the funding tourism brings them; the sector's footprint where it is measured.

Headline figures follow the definitions used in the EU Sustainable Tourism Strategy (SWD(2026) 777, Table 2): direct contribution from Tourism Satellite Accounts, and total impact, including indirect and induced effects, from the Joint Research Centre method behind the EU Tourism Dashboard. The EU overview then matches the Commission's headline of 10.1% of EU value added.

Going further

This is where ETC expects the partner to add most value. New data, often bought or provided by partners, can show tourism in ways official statistics cannot yet. Some ideas to start from:

Idea	What it could show	Possible data
Where the visitor euro goes	How visitor spending spreads across restaurants, shops, culture and local services, by region and month, and how much reaches small businesses	Card spending data (e.g. Mastercard, Visa)
Tourism against famous exports	Visitor export earnings compared with a country's best-known goods exports, such as wine, cars or machinery	Balance of payments and trade statistics
Where visitors really go	Visits beyond hotels and the capital, including day trips and rural areas	Mobile phone data (Eurostat experimental work, telecom operators)
Income for households	Money residents earn from renting rooms and homes to visitors, and where	Eurostat statistics on short stays booked through online platforms; platform data
What tourism keeps open	Shops, restaurants, transport routes and cultural venues that survive in smaller places thanks to visitors	Business registers, location data, ticketing and route data
Jobs and skills	The skills tourism employers look for and how tourism works as a first job and a route into other careers	Online job advertisement data (e.g. Cedefop)

Idea	What it could show	Possible data
High-value visitors	Spending by long-haul and high-spending visitors and where it lands	Tax-free shopping and card data (e.g. Global Blue)
Tourism that pays for nature and heritage	Park entrance fees, tourist taxes and visitor income reinvested in conservation and restoration	National and regional budgets, heritage agencies, park authorities
Greener journeys	Growth of arrivals by rail and other lower-carbon modes	Rail ticketing data (e.g. ETC associate members); passenger statistics
How residents and visitors see it	Residents' views of tourism's benefits; visitor satisfaction	Eurobarometer and national surveys; online review data

Some of these will not be feasible for every country, and some will cost too much. That is fine. ETC would rather show a few strong new indicators for most countries than a long list of weak ones. Several ETC associate members hold relevant data (card spending, bookings, rail, tax-free shopping), and ETC can ask them to contribute it free of charge. Applicants should list in their proposal the associate member data they would need, so that ETC can request it before the project starts. Data contributed in this way is credited in the reports.

Working principles

- **Sourced and honest.** Every figure shows its source and year. Modelled or commercial figures are labelled. Gaps are left visible, not filled with guesses.
- **Consistent.** The same definitions in every report, so that each country's figures can be read against the EU and ETC totals. The reports do not rank or compare countries with one another.
- **Checked by members.** Each national tourism organisation reviews its report before publication.
- **Built to last.** The reports can be updated each year, so 2027 becomes the first edition of a series.
- **Aligned with EU monitoring.** Indicators are chosen with the Commission's EU Tourism Observatory (due in 2027) and its common performance framework in mind, and with the planned revision of EU tourism statistics, which will look at privately held data. ETC will share the method and the lessons from new data sources with the Commission as input to both.

An illustrative layout

As an illustration only, a report could read like an infographic: a headline sentence, three bands (Economy, Society, Environment) and a few large figures. Applicants are free to propose a different format and features. Whatever the format, every figure shows its source and year, and the reports are accessible, work on a phone, print cleanly and are easy to embed in ETC's and members' websites.

Timeline

Partner selected by mid-December 2026. Indicators agreed by mid-January 2027. Prototype with the EU overview and three pilot countries in late January. All reports reviewed by members in February. Final reports in early March. Launch at ITB Berlin on 16 to 18 March 2027.

Why 2027

The United Nations has named 2027 the International Year of Sustainable and Resilient Tourism. The EU Sustainable Tourism Strategy, adopted in November 2026, moves into implementation: the EU Tourism Observatory and a proposal to modernise EU tourism statistics are both due in 2027. Greece holds the Presidency of the Council of the EU in the second half of the year. As the post-2027 EU budget settles, funding decisions move to national capitals and into the National and Regional Partnership Plans that the Strategy invites Member States to use for tourism, where members need their own figures.

Who ETC is looking for

A research partner, or a team combining economic research and data design, with ideas of their own: someone who knows the official statistics well, including the EU Tourism Dashboard and the Commission's methods, and is curious enough to look beyond them.