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CALYPSO STUDY
FINAL REPORT

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EXECUTIVE SUMMARY

Within the context on the Calypso Preparatory Action, the Study "Tourism exchanges in Europe, enhancing employment, extending the seasonality spread, strengthening European citizenship and improving regional/local economies through the development of Social Tourism" has been carried out. The overall objectives of the preparatory action are stated in the terms of reference as: to generate economic activity and growth across Europe; improve seasonality patterns in Europe, in particular through the social policy function of tourism; create more and better jobs in tourism; and to strengthen European citizenship.

The Calypso Study has had an explorative approach and has consisted of five separate but interrelated tasks: Task 1 to catalogue Good Practices; Task 2 to undertake a scoping of target groups and market potential; Task 3 to suggest mechanisms to increase tourism exchanges in Europe; Task 4 to suggest ways to improve attractiveness of the scheme; and finally Task 5 to undertake a survey of non-participating countries. The four target groups Calypso aims to encourage tourism exchanges toward are people with disabilities, youth (18-30), families in social or economic difficulties, and seniors (+65 or retired). Extensive research has been carried out in all 21 participating countries[1], as well as on the European level, with desk research and interviews of involved stakeholders. The results of the research can be found in the "Good Practice Compendium", in "Country Profiles" and in the current main report.

The main findings from Task 1 Good Practices showed that few countries currently actively work to stimulate transnational tourism exchange for the target groups. In some countries (Italy, France, Spain, Portugal), there is a rather strong tradition of supporting certain target groups (families, elderly) to go on holiday, but in most occasions it concerns domestic travel. There are bilateral exchange programmes in place between Portugal and Spain showing good results in terms of financial sustainability. More recently, Spain has been running a pilot to attract senior travellers from selected European countries during its traditional low season. Although the support to transnational travel is rather new, results are promising so far in terms of revenue and employment generation. More longstanding national examples confirm this picture, with economic impact studies showing considerable net benefit and multiplier effects from giving support for tourism (see further in Good Practice Compendium, Senior Tourism, IMSERSO and INATEL programmes). Summing up Task 1, there is clear evidence that countries can benefit from facilitating transnational European tourism for certain target groups during the low season. It is also clear that few countries utilise this potential today.

Task 2 contains a comprehensive scoping exercise looking into the target groups, supply and demand, seasonality aspects in the tourism sector, as well as existing organisms and structures delivering support to the target groups. It contains an extensive fact-based presentation of the target group populations, both in terms of characteristics and features, such as needs, demands, current travel habits, wish to travel more in the participating countries (Country Profiles), as well as aggregated data at the European level (Main Report). Each target group in itself contains several sub segments with different needs and demands, and cannot be easily grouped into homogeneous entities. The study findings show that all target groups are assessed relevant for Calypso actions; however, some groups are more likely to have a market potential off season than others.

The conducted analysis showed that the target group with the highest market potential is seniors, also illustrated by the fact that existing Good Practices mainly target seniors. However, off season exchanges for families with school aged children are deemed difficult, since high season in most destinations coincides more or less with the school holidays (although the study shows overlap is not complete). Youth is another difficult group for Calypso action, since research shows that this target group prefers to go on holiday during high season and may not be susceptible to good offers in low season. There is certainly potential with the other three target groups as well, but in these target groups, sub-segments would need to be targeted rather than the general population, as needs and demands differ to a high extent. An important finding to highlight is the complete agreement among stakeholders that disabilities must be addressed as a transversal target, as accessibility is one of the main barriers today for tourism of

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[1] AT, BE, BG, CR, CY, CZ, EL, ES, FR, HU, IR, IT, LT, LV, MT, PL, PT, RO, SI, SK, TK

not only people with disabilities, but also elderly with reduced mobility etc. While persons from the target groups may have individual needs in terms of support, help and care, a common feature of target groups is the wish to go on holiday as everybody else. Hence, there is a movement in Social Tourism from specialised supply towards more mainstream supply, something which is well in line with the Calypso rationale.

The study has undertaken an analysis of specific legislation by looking at the extent current national and/or European legislation can be an obstacle in developing tourism exchanges for certain groups. In the analysis, direct barriers have not been identified, and much of the existing legislative framework supports issues like cross border health care and free access to medical care on the same conditions as the national population. Regarding the Service Directive, it is important to note that it will open the tourism market and the free provision of tourism services in other Member States. Hence, the Service Directive will lead to a more open market and competition among service providers such as tourism operators, which should be beneficial to all clients/customers, including the target group populations.

On the supply side, the scoping exercise showed an interest in engaging and developing tourism exchanges in low season, but also hesitance towards whether it would be financially sustainable and sufficiently profitable. From the industry's side, the main concerns relate to whether offers can be sufficiently coordinated and with a scale enabling profitable operations. Most of the supply of Social Tourism today is driven by associations and NGOs (with or without support from the state), and in the short term perspective, this is likely to continue to be the case. Hence, in many countries, a network and offers are already in place or can easily be developed. The features mainly lacking in most participating countries are national structures which are mandated or can be mandated to work on developing and facilitating Calypso actions. In some countries, well established mechanisms exist, such as in France, Spain and Portugal, but in many countries the concept is new with limited organisational ability to engage in concrete actions to facilitate the development of Calypso.

A major discussion point during the study has been whether Calypso should be an "open" initiative or limited to certain target groups, certain suppliers etc. The discussion has been centred around whether Calypso should set criteria for supply and demand at the European level, i.e. to have criteria for who can benefit from Calypso (for example income thresholds) and for suppliers taking part (accessibility, sustainability criteria). The study has shown that income thresholds, or ways of defining vulnerable families for example, differ to a high extent between countries, and even within countries (with regional/local rather than national criteria). This has been manifested by the overview of criteria presented in the section on families. The study team's recommendation is that Calypso should be an open initiative at the European level, meaning that criteria (if any) for demand (the tourists) should be set at the national level. The Member States should also prioritise whether they wish to focus on certain target groups or on all target groups. At the supply side, it will be necessary to have criteria in place for assessing the quality and sustainability of offers, as well as to ensure that information on accessibility for example is correct and coherent. The verification of these criteria would need to be undertaken by participating Member States, and today the mechanisms to undertake or organise verification do not exist at the Member State level in most countries.

Therefore, it is recommended in Task 3 to focus, in a short term perspective, on supporting Member States to develop the necessary structure or organisation to engage in Calypso. The support should strive towards knowledge generation and exchange by facilitating knowledge exchange among Member States with longer experience in social tourism and those with less, and also to provide support in the setup of pilot structures for managing exchanges. In Task 3, a limited number of examples have been developed on the kinds of concrete actions the study recommends in a longer perspective. Firstly, it is recommended to seek to expand what Spain has initiated in seniors' tourism in order to include more countries/exchanges based on same or similar models. Secondly, a suggestion concerns health tourism, for example spa tourism, with the double function of vacation and treatment. Lastly, it is suggested to explore the possibilities for a European Holiday Voucher system based on the models existing on a national level in France, Hungary, Italy and Romania. A pan-European Voucher system would bring considerable benefits to both travellers and the industry, and it would also minimise the risk for distortion of competition through targeted subsidies or other forms of support.

In terms of facilitating information exchange, it is recommended in Task 4 to set up a Calypso Platform which can serve as a marketplace for supply and demand to meet. The platform should serve the purposes of marketing, creating awareness and facilitating information exchange on concrete offers and initiatives. The platform is intended to be web-based and to cater directly to the target groups as well as to intermediary organisations. It is recommended that one channel per target group is developed, since there is a difference in needs and demands, as well as a need to differentiate the "message", style and language towards the target groups.

The non-participating countries in Calypso are in general positive towards future inclusion and participation. It is not foreseen for countries with highly decentralised tourism structures, with regions responsible for tourism development (for example Germany), to participate at a national level. In other countries, notably the Nordics, there was a hesitance towards the term Social Tourism; for example, "tourism for all" is the terminology used in Sweden.

CONTENTS

1. INTRODUCTION

This document constitutes the final report in the study "Tourism exchanges in Europe, enhancing employment, extending the seasonality spread, strengthening European citizenship and improving regional/local economies through the development of Social Tourism". In the subsequent text, the study is referred to as the "Calypso Study".

More specifically, this study contains the following tasks in the Calypso Study, along with reference to the report structure:

Task 1	To catalogue main good practices concerning the four target groups across Europe (in participating countries)	Section 3: Good Practices Annex A Good Practice Compendium
Task 2	To undertake a scoping exercise aimed at better insight of concerned target markets	Section 4: Scoping Exercise Annex B Country Reports
Task 3	To recommend appropriate mechanisms to develop tourism exchange amongst Member States and Candidate Countries	Section 5: Possible mechanisms
Task 4	To identify means and ways to increase the attractiveness of the schemes among stakeholders from the demand and supply side in participating countries	Section 6: Platform and Marketing
Task 5	To carry out a survey amongst national administrations of countries not participating in the project.	Section 7

The research conducted and the researchers involved have done their utmost to access and analyse all relevant information, as well as to consult with the different stakeholders. Overall, the study team feels confident that the findings represent the most up-to-date and comprehensive overview of activities, trends and initiatives within the field of social tourism. Even so, there are certain to be a few gaps and some omissions in this report, mainly due to the extremely tight time plan for the study.

The report structure follows the tasks as indicated above. However, due to the level of detail and information in each task, the study team has in addition developed a section which presents and analyses all tasks in a synthesised manner.

2.   SYNTHESIS OF THE CALYPSO STUDY

First of all, it is important to set the scope and context of this study by defining what social tourism is, and particularly how it has been interpreted in the Calypso context. During interviews, this has been a recurrent theme, as the word and concept of social tourism holds many meanings, as well as to some extent negative connotations. One early finding in the study was the need to create common understanding; this has been promoted through awareness-raising events conducted within Calypso. Even so, there are still misconceptions and prejudices as to what social tourism really is and means. In the framework of this study, a broad definition has been employed.

2.1   Definitions and conceptual framework

The concept of social tourism has been defined in different ways. In 1993, the European Commission defined that "social tourism is organised in some countries by associations, cooperatives and trade unions and is designed to make travel accessible to the highest number of people, particularly the most underprivileged sectors of the population".[2]

More recently, in its opinion on "Social Tourism in Europe"[3], the European Economic and Social Committee (EESC) mentioned that an activity can be constituted as social tourism whenever three conditions are met:
- "Real-life circumstances are such that it is totally or partially impossible to fully exercise the right to tourism. This may be due to economic conditions, physical or mental disability, personal or family isolation, reduced mobility, geographical difficulties, and a wide variety of causes which ultimately constitute a real obstacle.
- Someone – be it a public or private institution, a company, a trade union, or simply an organized group of people – decides to take action to overcome or reduce the obstacle which prevents a person from exercising their right to tourism.
- This action is effective and actually helps a group of people to participate in tourism in a manner which respects the value of sustainability, accessibility and solidarity".

Although there is not a unique definition of the concept, the majority of stakeholders today recognise that social tourism refers to programmes, events, and activities that enable all population groups, particularly youth, low-income families, seniors and people with disabilities, to enjoy tourism while also attending to the quality of relations between visitors and host communities. It must be emphasised that alongside the social dimensions of facilitating tourism for all, the consultants were requested to immediately place an emphasis on practical solutions when completing the study, rather than focusing on finding a universally acceptable definition.

It should be stated that a main rationale for launching the Calypso preparatory action is the specific improvement of the seasonality spread. The overall objectives of the action are stated in the terms of reference as:
- Generate economic activity and growth across Europe
- Improve seasonality patterns in Europe, in particular through the social policy function of tourism
- Create more and better jobs in tourism
- Strengthen European Citizenship

The new point in this discourse is the connection to economic growth rather than an exclusive rights perspective of "tourism for all". Hence, it is important to keep in mind when reading the report and recommendations that the focus has been put on how individuals from respective target groups, with or without a need for specific support to travel, can be encouraged to go on holiday during the off season with reduced prices, and how potential suppliers can be prepared/supported to meet their specific demands and needs.

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[2] Quoted in: http://www.bits-int.org/en/index.php?menu=1&submenu=2.
[3] Opinion of the European Economic and Social Committee on Social tourism in Europe. OJ C318, 23.12.2006.

In the Calypso preparatory action, it is stated that the target groups are:
- Seniors, above 65 or retired/early retired
- Youth, between 18 and 30
- Families facing difficult circumstances
- Adults living with disabilities (also seen as a transversal target group).

As can be seen, seniors and youth are broad target groups, and will inevitably include fully independent tourism consumers as well as tourists with specific needs, such as disabilities and/or other difficulties. In the Calypso Study, this is taken into account by looking at sub-segments of the target groups since the needs for support will vary greatly within the target groups. However, in terms of scoping market and potential demand, the Calypso Study has not differentiated between individuals from the target groups that already go on vacation, and individuals which rarely or never go on vacation.

2.2 Main findings of the Calypso Study

In identifying the good practices to be further elaborated on and analysed, the study team has focused on practices living up to the following conditions:
- Off-peak season tourism
- Transnational or transregional tourism
- Some kind of funding/support mechanism, be it private or public
- Mechanism that is, or could be, directed to Calypso target groups

The screening of good practices provides only a few currently existing good practices that live up to the defined criteria, in particular with transnational perspective. Two of the main examples target seniors, and a few examples exist that focus on other Calypso target groups. The existing examples on other groups are on more of a "micro-level" for networks of suppliers and organisms catering to certain needs in the target groups, be it single parents or people living with disabilities.

Furthermore, it is clear from the study of good practices that the supply of offers for target groups already exists to a large extent. Different national organisations and stakeholders are clearly ready and able to provide services to tourists from other countries, and during the course of the Calypso Action, several interesting suggestions have been brought forward by stakeholders. However, **the examples brought forward have all been directed mainly at providing travel opportunities for the target groups, rather than at developing pan-European mechanisms for tourism exchange during off season,** which is the main objective of this study.

2.2.1 Is there a rationale in Calypso?
The study has shown that social tourism carries a real potential for the target groups as well as tourism providers, and in the end the economic and social cohesion in Europe. The study also shows that this potential is currently not realised, due in part to the negative connotation and misinterpretation of the term social tourism, and in part to the reluctance or hesitance from Member States and providers to invest in the field. It is due to such perceptions that the EC sought to strengthen the role of other objectives (e.g. seasonality and economic growth) within the study as a means to complement the traditional notions associated with social tourism.

Main findings from Task 2, the scoping, show the perceived lack of profitability for the private sector as a barrier to the development of social tourism from the supply side. It is frequently mentioned among suppliers within the industry that social tourism is perceived as less profitable tourism and that there is little or no incentive for suppliers to engage in it. However, as presented in the study, several good practices showing financial as well as social benefits do exist already, notably in the exchange between Spain and Portugal, as well as in the pilot project in Spain with Senior Tourism.

For example, IMSERSO in Spain includes exchange within its general offer of another well-known and exclusively national programme, Senior Holidays Programme, as a transnational destination, favoured by geographical proximity and the similarity of cultures and traditions. 1,200,000 people were able to take part in this programme during the 2009-2010 season, which is 200,000 more than the previous year. The Programme is highly demanded socially – more than two million people applied for seats during the 2009-2010 season - and a high level of satisfaction exists amongst those who took part in the programme. Approximately 308 hotels and 9,700 travel agencies have taken part this season. Since its creation in 1985, 11,200,000 people have benefited in total from this type of holiday. The Spanish State invested approximately €127 million the last season; this amount has financed 30% of costs, with the remaining 70% provided by users. According to the assessments made, this programme is sustainable from a financial point of view as the savings (in unemployment and other benefits) and income (VAT, income tax, etc.) generated allow for the recovery of the investment made. During the 2009-2010 season, a flow of €690 million is estimated. Moreover, by being carried out during the low season, it has generated and/or maintained 119,000 jobs (16,000 direct and 103,000 indirect jobs), a figure which is significant since Spain, like other Mediterranean countries, strongly suffers the effects of tourism seasonality with a fall in employment in this sector. The latest assessment, carried out by an independent international consultant for 2007-2008, estimated the economic impact of IMERSO at €1.53 recovered by the Spanish State for every euro invested.[4]

Studies have been conducted on the economic impact of both initiatives, showing a clear benefit for both the states as well as economic operators involved in terms of increased revenues and employment creation (see Good Practice Compendium for further description). According to the study team, these two examples serve to show that European Tourism Exchanges for certain target groups do carry a real potential, both from a social and economic perspective.

On the demand side, limited financial resources for holidays and leisure activities is one of the main barriers for several segments of Calypso target groups (see Task 2) to go on holiday. At the national level, depending on the country, different types of stakeholders at national and/or regional levels may take care of the targets' holidays through a variety of systems and a variety of criteria. National authorities are often hesitant towards sending individuals from the target groups to other countries for holiday and prefer to support domestic tourism. Thus they are reluctant to subsidise outbound tourism on the one hand, and on the other hand, they hesitate to subsidise foreign beneficiaries even if they are willing to develop inbound off-season tourism, as happens in Spain with the Europe Senior Tourism programme[5]. This is illustrated by the fact that "Social tourism'' and social tourism supply have different meanings depending on the country:
   • In some countries, there is a strong tradition to support social tourism in the same field of the demand as in the field of the supply (i.e. France and Belgium). For example, in the past France has developed dedicated supply for specific targets (especially accommodation).
   • Spain also has a strong heritage of social tourism but is more focused on supporting target groups (especially seniors) without dedicated supply.
   • In some countries, the term 'social tourism' is not even used (e.g. Austria), and in others, it may have a negative connotation (e.g. Poland).
   • The majority of participating countries are not much or not at all familiar with social tourism. In this sense, in most of the participating countries, public social welfare supports citizens facing social and economic circumstances to go on holidays inside the country, but few countries have developed dedicated supply. The few existing structures are accommodation and are mainly owned and operated by unions.

It is clear from the study that public funding in different forms will be a key factor for success so as to trigger a significant development of Calypso tourism on the European scale. Public investment can take place both through support to suppliers and through support to the direct beneficiaries or intermediary organisations, with mechanisms such as tax credits or other

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[4] "*Impact Assessment of the Holiday Programme for the Seniors from IMSERSO*". Price Waterhause Coopers. December 2008.

[5] Within the programme Europe Senior Tourism, Spain is subsidising visiting tourists from partner countries: cf. Task 1.

incentives. In four participating countries[6], domestic systems with voucher based subsidies exist, and such a form of subsidy would allow for a demand-driven and market-based development of the field. To this end, a comparative analysis of the different existing national systems has been undertaken, and recommendations for further study of a voucher based scheme developed. A European voucher system would have significant benefits in terms of facilitating exchange by directly enabling support to the traveller without involving cash transfers or selected providers, thus limiting the risk for distortion of competition. However, implementation of a European scheme would be rather complicated, as no pan-European organisation for managing such a scheme exists today, which is why further feasibility assessment would be necessary.

2.2.2 Who would be responsible for Calypso actions?

Throughout the Calypso study, there has been significant interest and engagement from different stakeholders, in particular relating to the kind of travel and offers that can be set up. However, the actual institutional mechanisms and drivers for bringing Calypso forward have to a large extent yet to be defined. All participating Member States and Candidate Countries express a genuine interest in participating in future Calypso Action, but also stress that the national structures and settings are not ready or sufficiently organised to take a leading and active role in developing future Calypso actions. However, no other mechanism apart from a Member State driven one would be possible. The Calypso preparatory action has a limited budget and time period, and it is not assessed feasible for the Commission to take a more active implementing role in Calypso. Hence, the future of Calypso will to a large extent depend on the interest and willingness of Member States to engage and lead the process in their respective countries, together with other stakeholders (European and National Associations).

In the study it is therefore recommended to focus on setting up close cooperation between different participating countries in order to test different ways of organising and implementing the future Calypso actions. On the basis of the findings of the study, it is suggested that concrete support, financial and advisory, is given to the Member States to engage in the second year of the Calypso Preparatory Action by launching a Call for Proposals. It is the recommendation of the study team that the call for proposal be launched with a requirement to collaborate between three or more Member States as a way to stimulate exchange and cooperation. In a few countries, structures and collaboration have already been established (France, Spain, Portugal, Belgium), and collaboration between these practices and other participating countries will be beneficial to provide lessons learned, advice etc on how to engage in social tourism.

The exact outline of a Call for Proposals will need to be developed by the Commission, but it is the recommendation of the study team that the call for proposal has the following as an overall objective:

- To develop and strengthen organisations and structures, to enable concrete participation in future Calypso actions

To achieve this, the specific objectives could be to support:

- Knowledge exchange and sharing of experiences between Member States, in particular regarding organisational set-up (for example by collaboration between experienced and less experienced countries in social tourism)
- Facilitating the concrete exchange of pilots (for example by feasibility studies, cost benefit analyses of concrete proposals, support to planning and coordination)

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[6] France, Italy, Hungary and Romania

2.2.3 Who should Calypso be for?

Our study has shown that while senior citizens and adults living with disabilities are the more potential target groups in terms of seasonality and feasibility of developing a mechanism in the short term, each target group presents a potential market for social tourism, from both the demand and supply points of view. Moreover, creating support for some target groups in the beginning while leaving other target groups to smaller attention could potentially create different classes of social tourism, which would be potentially harmful for the future development of support mechanism. It should nevertheless be kept in mind that creating a support mechanism, in particular for families facing difficult social circumstances, will require more concentrated effort from the different stakeholders, as intermediate organisations will have to be used to a larger extent than with the other target groups.

The differences of socioeconomic situations (age, health situation, etc.) cannot allow a global approach per target group, but should demand segmentation in order to be as close as possible to specific needs and availability to off-season travel. However, the feasibility of concentrating on only one or two target groups and segments in the beginning phase of Calypso will have to be carefully considered. As the Member States would be the main source of financial support, every Member State should have the possibility to choose which target groups to concentrate on or to leave out at this stage. In consultation with stakeholders, the following points have been specifically highlighted:

- Accessibility needs to be cross-cutting in any initiative and not exclusive to actions directly targeting people with disabilities. At the same time, people with disabilities need to be separately targeted due to the high level of non-travelling adults today. People with disabilities are at higher risk of unemployment, poverty and marginalisation, which calls for specific actions targeting the group.

- The idea of Calypso is to provide opportunity for off-season travel at reduced prices and with targeted support. In the view of most stakeholders, Calypso should mainly benefit people who do not otherwise travel, be it for financial, physical or social reasons. However, to set criteria for participation relating mainly to income (and thus need for specific subsidy) will greatly limit future Calypso actions, since future work will depend on participating countries supporting travel for participants. Another aspect is the social mix Calypso initiatives could encourage by having a more open approach. It is therefore the suggestion of the study to keep Calypso "open" and not employ strict criteria at the European level for participation or access to Calypso offers. The selection of participants should instead be up to each participating country and intermediary organisation, which can set the relevant criteria in the national context. The criteria that could be developed at a European level are explained in chapter 5.8.

- It is imperative that offers generated within a Calypso action have a harmonised approach to accessibility and services offered. An outset can be to use one of the existing accessibility platforms described in section 5.1.3 to categorise and certify all Calypso destinations (not only the offers targeting adults with disabilities). An open access to a Calypso platform, for information purposes, would then serve to inform both travellers and intermediary organisations of the accessibility conditions at the venue.

In the following, findings on each target group are presented in a short form. For more extensive information, please refer to sections 5.1 to 5.4, where references and sources can also be found.

People with disabilities
Estimations made by Eurostat show that the population experiencing disabilities or long-standing health problems among the EU-27 working age population (from 16 to 64 years old) accounts for more than 46 million. This figure does not include senior citizens, whose demand for accessibility is high; they represent at least 80 million of the European population.

In addition to accessibility, the other needs of people with disabilities are specific to each kind of situation and depend on the kind of deficiency, the level of dependency (especially financial) and

the social status. Apart from an accessible tourism chain and reliable information, finances, transportation and educated staff are the most often mentioned needs. For those who can travel individually, there is no major difference in travel habits compared to people without disabilities of the same age and social class, including in terms of seasonality (families in particular will travel during school holiday periods).

Among possible segmentations of the adults living with disabilities target group, the most practical segmentation in the framework of Task 2/Task 3 is between fully independent travellers (FIT) and people wishing to travel in groups according to their financial situation.

Seniors, aged over 65 or retired

EUROPOP 2008[7] forecasts that in 2040, the percentage of the population over 65 years old in the EU 27 will increase to 27% and will reach 30% in 2060. If the growth potential of this group is added to the potential target itself, the potential of senior tourism is revealed to be very strong. It can be concluded that senior tourism is possibly one of the segments with the most growth potential over the coming years in Europe. At the same time, the attitudes to age are changing over time. Senior citizens feel younger (on average 10-15 years younger than their "real" age), and due to this perception they also act accordingly by continuing an active life, including travelling, for several years after their retirement.[8]

Seniors in many countries are already active travellers, and so it must be emphasised that the aim of Calypso must be to get people to travel more, not just at other periods in time. This is particularly important in the seniors segment, as this target group is available and often interested in travelling off season. It will therefore be important to ensure that future mechanisms do not just shift travel from high to low season, but also amount to an actual increase in travel.

In terms of needs, the seniors segments have high demands and the same concerns as people with disabilities in terms of accessibility, health facilities etc. As with all target groups, seniors range from being fully autonomous to being in need of significant support for travelling on holidays.

Young people

The 18 to 30 years old group does not exist in official European statistics. The closest bracket for which statistics are available is the 20 to 29 years old group. Figures from 2007 (EU Youth Report 2009[9]) indicate that some 66 million people aged between 20 and 29 reside in the European Union and 96 million European inhabitants are between 15 and 29 years of age.

In terms of share of the population, youth represents about one-fifth of the total population (19.4%), with the proportion of young people aged between 25 and 29 (6.9%) slightly higher than the share of young people aged 20-24 (6.5%) and 15-19 (6%). The share of youth aged between 15 and 29 in the total population at the national level ranges between 22% and 24% for the Baltic States (Estonia, Latvia and Lithuania), Cyprus and Malta, whereas it is less than 20% (average proportion at the European Union level) in Austria, Germany, Finland, Greece, Italy, Luxembourg, the Netherlands, Sweden and Belgium, Spain and the United Kingdom.

Young people travel a lot and represent a large part of the worldwide tourism economy. Youth travel represents 20% of international tourist arrivals (160 million arrivals per year) and 18% of worldwide international tourism receipts. Europe represents 56% of the worldwide youth travel

[7] Population projections produced by Eurostat every 3-4 years

(http://epp.eurostat.ec.europa.eu/portal/page/portal/population/data/database)

[8] Pelz, Alexandra. Leisure time activities of the 50plus aged target group(s) under special consideration of exercise, sports and culture. Hans Schnait coop 50plus, Wien, June 2009.

[9] p. 9, Commission staff working document accompanying the Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions, Youth - Investing and Empowering (EU YOUTH REPORT), Brussels, 27 April 2009, SEC(2009) 549 final

market. Young people have time to travel, but lack of money is a constraint, reducing the number of young travellers. The youth travel market is growing, and due to longer travel lengths, young travellers spend more than the average tourist during the trip[10].

Youth travel is a particular market; however young travellers mostly do not view themselves (self-description) as tourists because personal development and cultural dialogue are the major preoccupations instead of leisure. Only 23% of young travellers view themselves as tourists.

Families
The target group "families" covers multiple types of families (children, parents and/or grandparents) certified by their country's coordinating authority as facing difficult social, (financial, personal and/or disability) circumstances. The definitions of the families facing difficult social circumstances differ greatly from one participating country to another. The target group consists of several types of families, such as: families with a low income (for example families with an unemployed parent); families supported by a single parent; families with more than two children; families with a child/parent with a disability; families facing social difficulties (for example alcoholism, drug addiction, abuse, health problems); families taking care of older family members (for example grandparents).

The definitions of low income differ from one participating country to another. Due to the difficulty in setting one single definition for families facing difficult social circumstances, many participating countries are unable to assess the number of such families in the country. It is however known that in 2008, 17% of the EU population was assessed to be at-risk-of-poverty when following the concept of relative poverty adopted in the EU. In relation to the target group of families, statistics show that 20% of children were at-risk-of poverty in the EU, with the highest figures found in Romania, Bulgaria, Italy and Latvia. Children were thus in greater risk of poverty than the rest of the population in the EU. According to the EU-SILC (Statistics on Income and Living Conditions), the main factors of child poverty are the labour market situation of the parents, as well as the effectiveness of government intervention through income support and the provision of enabling services such as childcare.

2.2.4 What kind of travel could Calypso offer?

The study shows clearly that the current trend is to develop a "non-specialised offer" instead of a "social tourism offer". Consequently, the development of specific products for social tourism should not consist of specialising in tourism facilities and accommodation, but more in helping and accompanying people not used to travelling, such as with preparation, help for travel, welcome on site, etc.

Currently, the existing dedicated "social tourism" offers are progressively open to all clients (i.e. in France) or are not-for-profit structures supported by Government financial helps (i.e. trade unions centres). This trend is foreseen to continue, and there will be a shift from specialist supply to mainstream supply in the sector.

A definition of Calypso supply could be that it potentially concerns all tourism products and service providers on the condition that they can offer lower prices during off-season, as well as on the condition that they can cater to the Calypso target groups, both in terms of accessibility for citizens with disabilities and other criteria such as sustainability. The differences of socioeconomic situations, age, health situation, etc. do not allow for one global approach per target, but should be segmented in order to be as close as possible to specific needs of the targeted individuals and their availability for off-season travel.

2.2.5 How can Calypso Actions be promoted?

It is clear from the study that Calypso carries a potential for increasing tourism exchange in off season between European countries, and that this could bring social and economic benefits. While the offers are present, there is currently a lack of Calypso-related channels to market offers and structures to drive the development. Evidently, the structure for driving the development needs to be in place before marketing channels can be developed. Therefore, the recommendations of the study focus on supporting structures in the first instance. However, once exchange structures are in place, there will be a need for a platform for Calypso offers to connect the demand with the supply, and thereby enable growth and organic development.

In the study, a "Calypso Platform" is proposed which could serve as a tool for connecting demand and supply. Several existing platforms have been reviewed, and a basic scheme for how a platform could function has been developed. It is important to highlight that a development of a dedicated Calypso platform would require the active involvement of Member States, intermediary organisations, and other stakeholders in terms of developing offers, managing demand and controlling supply. It is therefore foreseen that a platform will be possible when the necessary structures are in place.

Moreover, it will be necessary for a Calypso Platform to target the information to differences within and between target groups. Not all travellers are necessarily in need of support, either financial or social, in order to benefit from Calypso offers. Hence, the proposal for a platform has been developed with different sub-segments in mind in order to ensure maximum outreach and market penetration.

2.2.6 What will it take to engage remaining European Countries?

A major concern for some of the participating countries has been the fact that some large European tourist countries have not been taking part in the first year of Calypso. This mainly pertains to countries in southern Europe and around the Mediterranean, for whom the Scandinavian countries, Germany and the United Kingdom are main tourist emitting countries and would be a natural target market in future Calypso Actions. In the study, interviews have been undertaken to assess both the rationale for not participating and the willingness to engage in the future.

Calypso's approach based on the four target groups is globally in line with the Estonian, Finnish, Macedonian and Dutch visions of 'social tourism'.[11] The approach is not relevant for Sweden, where an inclusive vision of "tourism for all" is preferred. This would however not be a barrier to participate in Calypso, since the target groups could be studied from a business perspective, highlighting the growth potential of each of the four consumer groups for the Swedish tourism industry. These countries also consider the economic approach and the focus on off-seasonality to be relevant; however, in Finland Calypso is not considered as a relevant answer to the seasonality constraints.

The lack of human and financial resources is the main reason for these countries' decision to not take part in the Calypso preparatory action. In that sense, a support from the Commission to strengthen the structures in charge of tourism in these countries would be helpful for them to participate in the next steps.

Joining the next steps of Calypso is a possible option for each of these countries. This decision would depend on:
- The concrete objectives and content of the next steps;
- The expected outputs for the national tourism industries;
- The level of involvement expected from the Member States, in terms of human and financial resources.

In Germany, the term "social tourism" is understood in different ways by different actors. In general terms, it can be said that social tourism is mainly understood as holidays and recreational stays for people with social difficulties. Examples of social tourism include holiday

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[11] Regardless of what definition is used on the national level.

stays (Kur) for mothers and their children, the granting of holiday money, support for family and youth tourism, as well as barrier free tourism. Supporting tourism is the task of the German Länder, while support for youth and families is mainly the task of municipalities and cities. An important part of supported youth and family tourism is organised by independent actors, while the funding comes from public finances.

With respect to families facing difficult social circumstances, the Federal Ministry for Family, Seniors, Women and Youth has for the last 50 years supported the construction of family holiday centres in Germany. These centres particularly direct their services to those who have difficulties in finding mainstream tourism products suitable to their needs, such as large families, single parents, families with a family member with a disability and families with low income. Moreover, families with low income receive financial support in 13 Länder for holidays in family holiday centres, youth hostels or farms.

The main reason for the non-participation of Germany in Calypso is the differing understanding of the concept "social tourism"; Calypso is not seen to be in line with the German vision of social tourism. Germany is not planning to participate in the following phases of Calypso, at least not on the national level.

The United Kingdom would like to review both the findings of the pilot stage and the objectives and possible future actions before considering further involvement.

3. METHODOLOGY

In this section, main aspects of the methodology are presented and discussed, and some of the challenges faced in terms of availability of data and the timing of the study are touched upon.

3.1 Methodology used in data collection

The main instruments for data collection have been interviews and consultations with stakeholders, both at the European level and in participating countries. Where appropriate, other means of communication have been used, such as e-mail questionnaires and meetings/workshops.

For each task, a set of guidelines and interview guides was developed and distributed to the national experts. In a few countries, English was used as the working language, but a native speaking expert was used in most countries to undertake the research and subsequently translate the guides and questionnaires.

A country report has been prepared for each participating country that contains the following information:
- Summary
- Analysis of the four target tourism markets
- Analysis of the tourism sector
- Legislative perspective
- Feasibility for development of products for social tourism
- Existing web portals
- Annex: List of interviewees and references
- Annex: Good practice descriptions.

All country reports have been sent to national contact points for verification and comments.

In the Task 1 Good Practices study, the team has also incorporated non-participating countries with interesting practices, as they may be useful for inspiration and further development in a European context. This can be found in the good practice compendium in Annex A.

Throughout the process, extensive consultations have been undertaken with involved stakeholders and the Commission. In the final phase of the study, these consultations further intensified as the final recommendations were elaborated in more detail.

3.2 Barriers and constraints in the data collection

The study team has faced several difficulties and challenges in the data collection. Some of it has been due to time constraints and an intense work schedule, but some of it is also related to other factors. The main issues that arose during the course of the work are described below.

Different interpretations of Calypso and Social Tourism – different stakeholders hold different interpretations and expectations on the study and planned subsequent activities. As mentioned in the introduction, the "traditional" view of social tourism (the right to vacation for people who will otherwise not travel) is not the main focus of Calypso, although it is still the main approach and focus by certain organisations representing the target groups.

Industry's approach - industry and supply organisations tend to perceive the Calypso action from a social angle rather than an economic development angle. These diverging views on the area, with the basic understanding and assumptions differing from one stakeholder to another, made it a challenge to develop recommendations and have a discussion on what mechanisms can be put in place. These will continue to be a challenge in future Calypso Actions, and the aim will be to arrive at a more common and homogenous approach.

High expectations from stakeholders – it has been clear in interviews and consultations that stakeholders have high expectations on the level of involvement from the Commission in promoting Social Tourism. In particular, there are expectations of funding and financial support, which cloud the ability to think "smaller" in terms of what activities can be undertaken, as well as what role and responsibility respective stakeholders could have in a European mechanism. It is also clear that participating countries lack adequate structures or mechanisms in most cases to engage in more consolidated efforts on a European level. The creation of national mechanisms will be an important task for future Calypso actions.

Lack of data on target groups and suppliers –it has been difficult to find the data requested in the scoping exercise in several countries, simply because the statistics do not exist, such as data on the target group population and their current travel habits. When no specific data exist, a qualitative assessment has been done through interviews.

Lack of data on economic impact of social tourism - the assessment studies of economic spin-off conducted by IMSERSO and INATEL are the only existing studies among participating countries.

Non-participating key countries – a number of Member States chose not to engage in Calypso, with several of them being main outbound countries (i.e. tourism consumers). This has led to a weak demand side analysis for certain segments. For example, Scandinavian seniors travelling extensively to southern Europe are a main target for suppliers there. There have been concerns from some participating countries, mainly in southern Europe, that this impedes the possibility to generalise from the study's findings. The study team considers this a valid statement, but also acknowledges that tourism proposals developed and marketed for off season travel will probably also benefit current non-participating countries, and will not be exclusive to the participating countries during the first steps of Calypso.

4. TASK 1: GOOD PRACTICES

The separate Task 1 report on identified Good Practices can be found in annex A to this report, The Good Practices Compendium. In the compendium, good practices from both participating and non participating countries are described and the responsible agent/organisation identified. In the following text, a couple of the good practices are described that have already had a transnational aspect relating to senior travel.

In identifying the good practices to be further elaborated on and analysed, the study team has focused on practices living up to the following conditions:

- Off-peak season tourism
- Transnational or transregional tourism
- Some kind of funding/support mechanism, be it private or public
- Mechanism that is, or could be, directed to Calypso target groups

This screening provides only a few currently existing good practices that live up to these defined criteria, as presented below.

4.1 Transnational Europe Senior Tourism

The most comprehensive practice to date is a pilot experience, SEGITTUR, which started in the 2009-2010 season. The programme is promoted by the Spanish government (Ministry of Industry and Tourism), with the management entrusted to SEGITTUR, a public company. In its first-year pilot experience, other Member States have been invited to take part, although they have adopted a passive approach. Thus, it might be called a type of **asymmetric exchange.**

The Spanish government and the participating regional authorities will provide a set amount of €150 per participant from Slovakia, Czech Republic, Poland and Hungary, and €100 for residents in other eligible EU countries, with the exception of those countries not included in this preliminary pilot stage. For example the maximum payment for beneficiaries with the grant (VAT included) amounts to €343 for an 8-day stay for the residents in Slovakia, Hungary, Poland and Czech Republic.

The exchange takes place during **the low season,** from 1 October 2009 to 30 April 2010. The stays offered are for 8, 15, 22 or 29 days. Travel includes flight, full board, and transportation to and from the airport of origin to hotel at destination, as well as the programme activities and an insurance policy. The expected investment is €11 million, €6 million of which will come from the Spanish government (€5 million for the holiday programme and €1 million to promote the project), and €5 million shared equally by the two regional governments involved.
Approximately 45,000 users from nine different Member States have been involved in this first year of the Programme; this number could have been higher due to the cancellation at the end of the season of 6,000 bookings because of the closed air space resulting from the Icelandic volcanic ash. 37,371 users came from countries subsidised with €100 and 7,729 came from countries subsidised with €150. According to the surveys carried out, 9 out of 10 travellers had never been in Spain, which confirms the organisers' purpose of aiming the scheme to a new public and thus increase the market of visitors.

The final investment made by the Spanish State amounted to €5.3 million. The Spanish Administration contributed 22% of the total cost, whereas users contributed 78%.

As regards the offer, more than 50 hotels, all 4-star, were inscribed in the pilot programme, located in the destinations selected for the first season 2009-2010: the three Balearic Islands, Costa del Sol and Costa de la Luz in Andalusia. There was an estimate 370,000 overnight stays, with an average stay of 8.25 nights.

The subsidy from the Spanish State is destined for every booking made; that is, it is directed to the persons travelling and not the companies (e.g. hotels). However, the subsidy is not paid

directly to the persons but is a bonus on the price. The Spanish State establishes an average price for the cost of the tourist package and then applies a discount or bonus of €100 or 150, depending on the country of origin. In this way, the final customer purchases the package with the applied discount/bonus, and thus it is the customer who benefits directly from the discount by purchasing the package at a lower price.

However, the operating company (selected as the best offer through a public call for tenders), handles and offers/sells the tourist package. It is this company that receives the subsidy amount (€100 or 150 per seat) once the accounts are settled for the tourists who actually arrive in Spain, <u>since the bonus is per, and for the, tourist</u>.

The results of the assessment on this first pilot experience are very positive[12]. Using contrasted methodology from previous studies in this sector, with direct and estimated figures, the assessment calculates that for every euro invested, the Spanish State has received (or recovered) €1.32 in taxes (VAT and other taxes as a result of economic activity) and other savings (social protection). Significantly, other European states/public administrations that have taken part in this pilot experience have also received (without contributing anything) an estimates €0.23 on average for every euro invested by the Spanish State. That is, for every euro invested by the Spanish administration, there has been a total return of 1.55 euro overall. This amount is broken down for each of the 14 countries taking part and detailed under three headings: i) Marketing at origin (local travel agents) of the tourist packages; ii) Air transport: most transport has been carried out through non-Spanish air lines (LOT, Air Berlin, Air Lingus, Blue Air, Ryanair); and iii) Other services".[13]

According to the assessment made, the impact of the Senior Tourism Europe programme on EU economy is estimated to amount to €29 million. Of these, more than €22.5 million have been generated in the destination country, Spain, with an estimated creation of 609 direct jobs (almost 50% of which were created in the hotel sector).

The results in the country of origin and at European level are also significant (transport companies can pay taxes in other countries that do not take part in the Spanish programme): economic impact at origin amounts to more than €6.6 million, with an estimated 85 direct jobs associated to the programme. In terms of direct fiscal impact, administrations in other European countries are estimated to have collected approximately €1.2 million. This represents a collection of €27.48 per booking/travel made.

The Transnational European Senior Tourism programme is an ambitious transnational programme with the intent to be financially sustainable for the Spanish state. This is because the individual payments basically originate from public savings from unemployment benefits, hence exchanging a passive unemployment payment policy for an active employment policy. The subsidy is used as an incentive to attract more and new tourists; therefore a no-repeat policy will be implemented to avoid the same persons from benefiting from travelling several years.

The programme complies with the values of the Calypso initiative. Amongst others, it reinforces European citizenship in a selected target group, aspires to promote transnational exchange, and contributes to maintaining the level of employment and economic activity in the sector during the low season. However, given its "one-off" modality, it is questionable whether it corresponds well to the target-group criteria, as it is mainly an instrument to attract seniors. However, experiences from the pilot phase could be studied to determine whether the expected multiplier effect (i.e. every invested euro gives a higher return to the state) is realised. If the model proves to be sustainable, it can be a valid argument and incentive for other countries to invest in similar programmes, while also putting in place more permanent transfer schemes to subsidise off season travel, thereby linking it to a European model.

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[12] "*Assessment on profitability and economic impact generated by the programme Senior Tourism Europe*", carried out by an independent consultant specialising in tourism on behalf of Segittur. Innova Management. June 2010.
[13] id.

4.2   Transnational Bilateral Exchange between Spain and Portugal

Another interesting example of exchange is a well established programme between Spain and Portugal comprised of a reciprocal exchange in practice between two institutions. INATEL in Portugal promotes, administrates and manages the exchange. IMSERSO in Spain promotes and partially manages the programme with the support from an operations company in its organisation. The main features of the programme are described below.

- It has been working as a bilateral transnational agreement since 1999.
- It is a reciprocal exchange: each institution selects the participants, Portuguese or Spanish, and finances the transport to destination, as well as accommodation and maintenance of those travelling.
- Volume: 4,000 people are exchanged per country and per season/year.
- Duration: 8 days (7 nights) stay in low season.
- Travelling takes place off season, from October to May.
- Mechanism for selection of participants: in Spain, selection is centralised. Applicants request a seat in hierarchical order in several of the offers available. Selection is made by weighting the following criteria in order of importance: older age, lower income and not having travelled previously in the same programme.

The reciprocity scheme is a positive value, but could be difficult to implement in a multilateral transnational context. It would also require a "central administrator" with the capacity to organise and route the requests and holiday shifts. This is not considered realistic at this point in time, and on a European scale it would be a logistical challenge to achieve symmetric exchanges, however appealing the idea might seem.

Both of these examples target seniors, and few examples exist that focus on other Calypso target groups. The existing examples on other groups are more on a "micro-level", for networks of suppliers and organisms catering to certain needs in the target groups, be it single parents or people living with disabilities.

4.3   Holiday Vouchers/Schemes

A recurring mechanism, in practice as well as in discussion on possible Calypso actions, relates to Holiday Voucher schemes. In five European countries (France, Hungary, Italy, Romania and one non-EU member, Switzerland), systems based on holiday vouchers are in place. The systems are rather similar and all have a purely national scope. The interesting point is the wide application of the vouchers in most of the systems, for example to pay travel, accommodation, road fees, activities or other fees, all depending on the maturity and outreach of the voucher programmes. In Switzerland, REKA Money can even be used to buy food in super markets. It is also common for most of the systems to generate some form of surplus, making investments in social action possible.

5.   TASK 2: SCOPING EXERCISE

Task 2 focuses on the four Calypso targets by providing the most precise approach in order to increase awareness and understanding of the different targets and the diversity of cases inside these targets. Only the knowledge of these groups and the differences inside the groups in terms of profile, needs, supply, travel habits, etc. allows for the design and elaboration of adequate actions to increase their travel practices.

Task 2 main findings are presented target by target and according to the following points:
- Definition of the target: features, social and economic situations, travel habits, etc.
- Main findings on the four targets across participating countries, essentially in terms of preferred destinations, main barriers to go on holidays, and seasonality
- Presentation of the relevant stakeholders both at European and national levels, and a discussion on the way they approach the targets and support them, including their status, actions, involvement, and the role they can play in Calypso
- An analysis comparing the main features of the target groups and the barriers preventing them from going on holiday, the support each of them would need to face these difficulties and the possible answers Calypso can provide.

After these, the main findings on the supply-side, the suitability for Calypso targets (dedicated supply and mainstream tourism supply) and the seasonality aspects are presented.

5.1   Adults living with disabilities

5.1.1 Features of the target and market size
The definition of disability has recently evolved from a medical approach considering disability resulting from physical, sensorial and mental impairments to a social model highlighting the equal rights of persons with disabilities to be included in society. This new approach respects and recognises that persons with disabilities have the same rights as those without disabilities and respects the EU citizen's concept of disability. This concept is reflected in the EU Charter of Fundamental Rights, the European disability action plan 2003–10 and, more recently, the UN Convention on the Rights of Persons with Disabilities. Article 1 of the UN Convention on the Rights of Persons with Disabilities states that persons with disabilities are those 'who have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others'. The new approach moves away from the impairment of the individual to the ability — or inability — of society to ensure equal access to rights.

On the basis of this definition, the target group of adults living with disabilities is very heterogeneous. The different types of disabling conditions usually range from mobility, sensory and communication impairments to intellectual impairments and mental health disorders, as well as hidden impairments in the form of health problem (see Annex C1).

Estimations made by Eurostat show that the population experiencing disabilities or long-standing health problems among the EU-27 working age population (from 16 to 64 years old) accounts for more than 46 million. This figure does not include senior citizens, whose demand for accessibility is high; they represent at least 80 million of the European population. The graphs below (and Table 4 in Annex C2) present the distribution of the target between the 27 countries, including the elderly population, and the major types of long-standing health problems and disabilities (LSHPD).

Figure 1: Distribution of people with disabilities

Distribution of people with accessibility needs in 27 European countries

- Total disability population 21%
- Elderly population (>65) 63%
- People with hidden impairments 16%

Distribution of major types of LSHPD in 27 European countries

- 68%
- 19%
- 1%
- 4%
- 8%

- Mobility impairments
- Visual impairments
- People with deafness/hard of hearing
- Speech impairments
- Mental/intellectual impairments
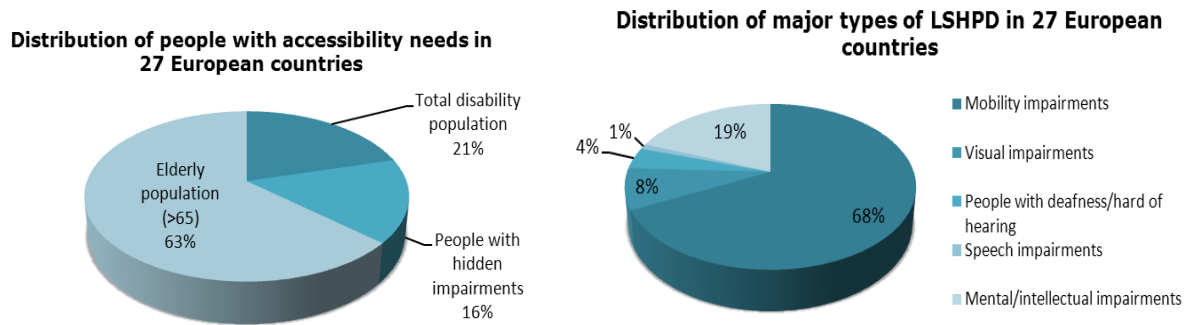
The figures concerning adults living with disabilities are controversial and vary from one source to another, depending on the definition given to disability. In the 21 participating countries in the Calypso Study, the counting approaches are so different (such as percentage of global population, persons receiving an invalidity pension, persons using wheelchairs, etc.) that comparisons between countries were impossible based on the information collected in Task 2 (see Annex C2).

The shared conclusion is that disability concerns a significant part of the European population. The European Disability Forum highlights that one in four Europeans has a family member with a disability and that six Europeans out of ten know someone, in close or more distant circles, who has a disability.

5.1.2 Global market trends

In Europe, less than half of the people with disabilities are employed, meaning that about 26 million people with disabilities are unemployed. In 2003, the employment rate of people with disabilities from 16 to 64 years old in the EU-25 was 40%, compared to 64% for people without disabilities (Eurostat). In the Czech Republic, for example, the rate of unemployed people among people with disabilities reached 71%.

Most of the people with disabilities are attributed a disability pension, which is under the minimum wage. In Latvia, Czech Republic, Lithuania, Malta and Slovakia, pensions are under €360 per month. This represents 36% of the average salary in Latvia and 56% of minimum wage in Malta. In Romania, the disability pension is €60 per month. In a majority of participating countries, the level of pension doesn't allow people with disabilities to go on holiday, especially abroad.

Even if there is not a global figure concerning holiday participation statistics of adults living with disabilities, stakeholders usually assume that their participation rate is lower than persons without disabilities of the same age and social class. The European Disabled Forum (EDF) gives the following statistics:

- One out of two persons with disabilities has never participated in leisure or sport activities.
- One-third of the disabled population has never travelled abroad or even participated in day-excursions due to inaccessible premises and services.

The adults living with disabilities, who are a transversal target group, face the same difficulties as other Calypso targets. Financial constraints may be reinforced for people with major impairments requiring an assistant or accompanying person, which represents extra expenses. The two specific key barriers faced by people with disabilities regarding tourism are lack of accessibility and lack of reliable information on accessibility. Accessibility concerns tourism infrastructures, transportation and attractions. It is rarely understood that the entire tourism chain, including trained staff, should be accessible, which does not go without problems given that a large part of the European cultural and historic heritage is by nature inaccessible.

One of the barriers to travelling abroad for people with disabilities is the diverse and often confusing set of policies and standards regarding access for people with disabilities existing across the EU Member States.

Figure 2: Accessibility concerns all segments of the tourism chain
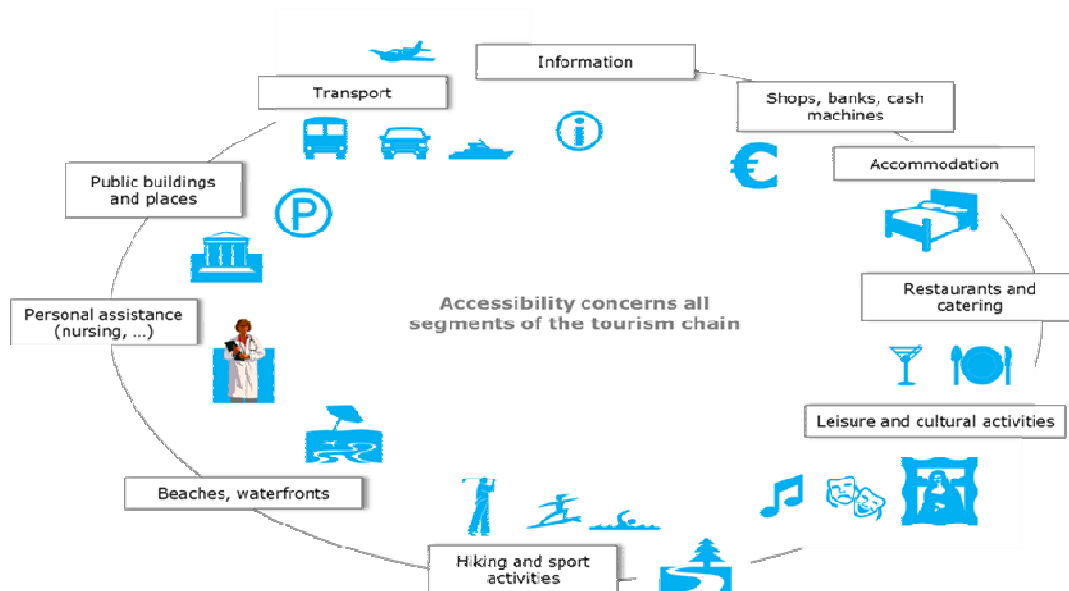
For those people with disabilities who can travel, there is no major difference in travel habits compared to people without disabilities of the same age and social class. The expectations of people with disabilities are to rest, relax, discover and escape from routine, including to not be constantly confronted with access barriers. A large percentage of people with disabilities like travelling individually or with family and friends.

However, the main difference remains in the level of autonomy and type of disability of people. People with mental or multi-disabilities, for example, prefer to travel in groups. People used to travelling individually in their own country may prefer the reassurance of a group when travelling abroad as well.

Concerning seasonality, tourists with disabilities travelling alone have the same habits as people without disabilities of the same age and social class. For example, people with children are constrained by school holiday periods, while non-working people do not have a particular constraint in terms of season. The ones travelling in groups are closer to the senior target and thus able to travel off-season.

In terms of tourism facilities and services, this heterogeneous target group has very diverse needs, depending on the type and degree of impairment (see Annex C4 & Annex C5). Main conditions concern built environment, transport, equipment and technical aids, personal assistance, medical care, and information about services and facilities.

Consumers with disabilities generally prefer tourism accommodation to be in the mainstream tourism sector and not 'specialist disabled'. Nevertheless, some persons with disabilities are dependent on specialised care, medical treatment and services, so would need to use specialised accommodation. The main point for the target is to have the freedom to choose between mainstreamed and specialised tourism accommodation. For certain groups, more is needed than an accessible infrastructure; care, therapy, and rehabilitation training may also be needed. The proximity of nature is preferred for people with mental disabilities. Access to surrounding areas and attractions is also important; for example, pavements, signage, lighting, pedestrian crossing and local services. Price is important for the target but considered with comfort and accessibility criteria.

5.1.3 Tourism supply accessibility

General approach
The definition of disability given by the UN Convention on the Rights of People with Disabilities implies that Member States should create the conditions for people to have access to the same services, facilities and transportation as other citizens[14]. Originally concerning employment and occupation (Directive 2000/78/EC), the protection against discrimination in Europe will be extended to other fields, including leisure, such as by improving access to information on accessible tourism.

Many Member States have implemented accessibility regulations and standards concerning the built environment, transport and information and communication technologies. Today, hotel classifications of many countries integrate the mention of the percentage of rooms adapted to people with disabilities, and building regulations define the notion of "accessibility for all". This takes into account accessibility for disabled people with mobility impairments in new public and tourism buildings, which is now often a criterion for national and European financial support.

Nevertheless, most of the tourism infrastructures in Europe remain non-accessible for people with disabilities. The University of Surrey evaluated wheelchair-accessible supply in 25 EU countries in 2004, and showed that only a very small proportion of the current tourism supply is accessible and designed "for all": 5.6% of the accommodation facilities, 11.3% of the attractions and 1.5% of the restaurants and catering facilities[15] (see Annex C4 for details). During the past five years, progress has been made by a majority of Member States, but incoherence remains, such as when hotels are adapted but accessible transport does not exist. Moreover, the accessibility is easier to find in up-market accommodation facilities, which create an additional barrier (higher costs).

Transportation
Concerning transportation, the regulation on the rights of passengers with disabilities travelling by air adopted by the European Parliament on the 15th of December 2005 states that:
- Internet booking sites of all air carriers should be accessible for people with disabilities and it should be possible to notify of needs for assistance through these websites
- No reservation can be refused on the grounds of disability except for safety reasons or insufficient size of aircraft
- Air carriers and airport managers must ensure that their staff has received appropriate training to assist people with disabilities
- Establishment of enforcement bodies and complaint procedures are obligatory.

Passengers of rail transport with reduced mobility and disabilities are also guaranteed assistance, information on accessibility and non-discrimination.

Information on accessibility
Even if it is not a mechanism of exchange, the accessibility schemes for tourist facilities are nonetheless considered as a prerequisite for quality and information on the supply accessible to people with disabilities. Only a few countries have approaches of certification and labels for tourism structures adapted to people with disabilities. The most known approach is the French one, 'Tourisme et Handicap', which has the purpose of providing reliable, descriptive and objective information on accessibility of tourist places and facilities, and takes into account all types of disabilities (physical, visual, hearing and intellectual), as well as the adaptation and integration of a tourist offer into the general offer. It concerns 3,658 facilities in France. In the Walloon region in Belgium, the 'Indice Passe-Partout' evaluates the accessibility of the buildings open to the public (see Annex C6). Czech Republic implemented a plan for "barrier free" facilities, but only very few facilities are concerned. Certification systems of the same kind exist in

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[14] Article 9 of the UN Convention on the Rights of People with Disabilities States Parties are committed to "take appropriate measures to ensure to persons with disabilities access, on an equal basis with others, to transportation, and facilities and services open or provided to the public."
[15] 'Accessibility market and stakeholder analysis – one-stop-shop for accessible tourism in Europe', Buhalis, D., V., Eichhorn, E. Michopoulou, G. Miller, University of Surrey, United Kingdom, October 2005

European countries not participating in the Calypso study: 'DisabledGo' in the United Kingdom, a Danish Accessibility Label, and 'Mindeststandards' in Germany.

Table 1: Existence of legislation regarding accessibility of tourism infrastructure

Country	Legislation regarding accessibility of tourism infrastructure	Existence of a specific label
Austria	Yes	No
Belgium	Yes	Yes
Bulgaria	No	No
Croatia	Yes	No
Cyprus	Yes	No
Czech Republic	No	Yes
France	Yes	Yes
Greece	Yes	No
Hungary	Yes	No
Ireland	Yes	No
Italy	Yes	No
Latvia	Yes	No
Lithuania	No	No
Malta	Yes	No
Poland	No	No
Portugal	Yes	No
Romania	No	No
Slovakia	No	No
Slovenia	Yes	No
Spain	Yes	No
Turkey	Yes	No

The website www.Europeforall.com, developed in a European Commission-funded project named OSSATE, provides accessibility information about tourist venues in six countries (Austria, Belgium, Denmark, Greece, Norway, Sweden and the United Kingdom). The website, available as a service for venue owners and data providers in Europe, is managed by EWORX S.A., Greece. The main function of Europeforall.com is to help travellers requiring accessibility information to plan their holiday or business trip more easily and with confidence. The Europe for All (EfA) database contains the results of individual assessments of venue accessibility based on standard questions and checklists (see Annex C7).

The website www.disabledgo.com is a more comprehensive website that could be transferable on a larger scale. It is the United Kingdom's premier provider of personally-surveyed access information and details over 70,000 venues. Working directly with public and private sector partners across the United Kingdom, DisabledGo researches and inspects all kinds of venues, awards symbols depending of the kind of accessibility, and produces access guides to public venues. DisabledGo has just contracted with OpenBritain, becoming the largest leisure time information resource in the United Kingdom for all of those with access needs. The online research is made by destination rather than by kind of venue (accommodation, attractions and travel). For each venue, symbols indicate the kind of disability taken into account (see Annex C8).

5.1.4 Structures and players

European level
At the European level, the main public sector organisations dealing with targets with disabilities are:

- The European Commission, which supports the training of people with disabilities so they can work in tourism.
- The Disability Intergroup of the European Parliament, established in 1980, which is a cross-party group of the Members of the European Parliament from each of the 27 EU Member States and supports the rights of people with disabilities.

In addition, the Commission supports life-long learning through the Leonardo da Vinci programme for vocational education and training. Examples include the Happy Tourist project, which looked at training hotel service personnel in dealing with all social tourists, from children to people with disabilities. It also addressed mainstreaming disability issues in order to facilitate the active inclusion of people with disabilities, which is a particular EU concern since persons with disabilities have the same rights to enjoy tourism and leisure opportunities as everyone else. Furthermore, the percentage of Europeans with disabilities is increasing as the population ages. Therefore, the Commission is working on means to ensure equal access and opportunities for employment and leisure, for example through improving access. One of the key issues in this context is solving accessibility problems and opening up training.

The **European Disability Forum** (EDF) is the European umbrella organisation representing the interests of 65 million citizens with disabilities in Europe. EDF membership includes national umbrella organisations of people with disabilities from all European Union/European Economic Area (EU/EEA) countries, accession countries and other European countries, as well as European NGOs representing the different types of disabilities. It was set up in 1997 to be a strong, independent body speaking with one voice, the voice of people with disabilities. This means that all members of the elected bodies of EDF are disabled or are family members of people with disabilities unable to represent themselves. It covers the diversity of the disability movement-physical impairments but also people with sensory impairments, people with intellectual disabilities, mental health problems or chronic illnesses. The mission of EDF is to ensure people with disabilities have full access to fundamental and human rights (including right for holidays) through their active involvement in policy development and implementation in Europe. Supported by the European Commission, EDF gives figures and raises public awareness on the integration of people with disabilities in the working world, leisure and studies.

The **European Network on Accessible Tourism** (ENAT) is a non-profit organisation established in January 2006 as a project-based initiative of nine sponsoring organisations in six EU Member States. The European Commission, DG Employment and Social Affairs, gave financial support to ENAT for the first two years of operation. The mission of the ENAT is to make European tourism destinations, products and services accessible to all travellers and to promote accessible tourism around the world.

Other European networks work on the disabled target:

- **EUCAN** is an expert network of the European Concept for Accessibility.
- **EIDD** (European Institute of Design for All in Europe) is a European network grouping together rational and corporate member organisations in 22 European countries. It was founded in 1993 with the aim to use design to achieve the inclusion of people with disabilities in society in European countries.
- **EDeAN** (European e-Accessibility and Design for All Network) is a network of 160 organisations within Member States and Norway. It was established in 2002 with the objective of ensuring access to the information society to all citizens, especially people with functional impairments and older people.

National level

At the national level, adults living with disabilities are taken into account by public authorities, usually ministries of social affairs, to support life conditions and rehabilitation of the target. Tourism and leisure of adults living with disabilities depend on ministries of tourism, which focus their action on the accessibility of tourism supply.

Table 2: Stakeholders on the national level

Country	Stakeholder	Type of stakeholder	Responsibility
Austria	Federal Ministry of Labour, Social Affairs and Consumer Protection	Public	Has the overall responsibility for the politics concerning people with disabilities in Austria.
	IBFT (Internationaler Barrierefreier Tourismus)	Public	Provides extensive information on accessible travel destinations, accommodation and activities for people with disabilities in Austria and in some other European countries.
Belgium	No information		
Bulgaria	National Social Security Institute (NSSI)	Public	Responsible for the payment of pensions and benefits to people with disabilities.
Croatia	Ministry of Tourism	Public	Conducts the programme 'Tourism without Barriers'
Cyprus	Ministry of Labour and social insurance- Service for the Care and Rehabilitation of Disabled People (YMA)	Public	Coordinates disability issues and offers specialised services to people with disabilities in the fields of vocational rehabilitation and social integration
	Cyprus Confederation of Organisations of the Disabled (CCOD)	NGO	Represents all organisations for people with disabilities in Cyprus
Czech Republic	Ministry of Labour and Social Affairs	Public	Pays social benefits and pensions through its Social Security Administration
	National Council of the Disabled	NGO	Represents the main body protecting the interest of this group
France	Ministry of Economy – Tourism department	Public	Responsible for norms
	Tourism and Handicaps	NGO	Responsible for the label
Greece	Ministry of Health and Social Solidarity	Public	
	National Confederation of Disabled People (ESAEA)	NGO	Umbrella representative association of all disabled associations in Greece
Hungary	Ministry of Social Affairs and Labour	Public	
Ireland	National Disability Authority	Public	
	Daisychain foundation		
	National Rehabilitation centre		
Italy	FISH ONLUS	NGO	Italian federation for overcoming handicap
	CERPA	NGO	European Centre for the Research and Promotion of Accessibility (national representative)
Latvia	Ministry of Welfare of the Republic of Latvia	Public	Responsible for making the national policy and its legal framework

	Cooperation Organisation for Persons with Special Needs in Latvia "Sustento"	NGO	Gathers information on tourism objects in Latvia and analyses their accessibility for people with disabilities
Lithuania	Department for the Affairs of Disabled at the Ministry of Social Security and Labour	Public	Implements measures of social integration of people with disabilities, coordinates the national programme of integration of the people with disabilities, provides financing from the State budget to projects and social services
Malta	Ministry for Social Policy	Public	Responsible for the questions related to adults living with disabilities
	National Commission Persons with Disabilities	Public	Represents the interests of people with disabilities in Malta
Poland	National Fund for the Rehabilitation of Disabled Persons (PFRON-Państwowy Fundusz Rehabilitacji Osób Niepełnosprawnych)	Public	Provides activities in line with the Vocational and Social Rehabilitation and Employment of the Disabled Persons Act of 1997. In addition, PFRON cooperates with regional and local governments and provides financial assistance for the realisation of projects and activities targeted for persons with disabilities
	Polish Federation of Organizations of Persons with Physical Disability (OFOONR-Ogólnopolska Federacja Organizacji Osób Niesprawnych Ruchowo)	NGO	Responsible for protection, promotion and integration of persons with physical disabilities, and ensures they have the possibility to take part in all economic, social, cultural and leisure activities of the society
Portugal	União das Misericórdias Portuguesas	NGO	
Romania	Ministry of Labour, Family and Social Affairs - National Authority for Disabled People	Public	Responsible for protection and promotion of the rights of people with disabilities, and implements the project "Disabled Mobility"
Slovakia	Ministry of Labour, Social Affairs and Family of the Slovak Republic	Public	
Slovenia	Ministry of Labour, Family and Social Affairs - directorate for disability	Public	Deals with the position of people with disabilities, their integration into society, training and employment, and participation in employment programmes
Spain	ONCE Foundation for Cooperation and Social Integration of Persons with a Disability	Public	Responsible for the programme 'Summer without Barriers'
Turkey	Republic of Turkey Prime Ministry Administration for Disabled People	Public	Defines the problems of people with disabilities and guarantees the realisation of services towards them

5.1.5 Possible Calypso actions for people with disabilities

First of all it needs to be acknowledged that in essence the disabilities target group covers all other target groups as well, meaning that accessibility and people with disabilities are young, old and have families. As such, disabilities are transversal, and should be considered in any action within Calypso, in particular regarding accessibility.

Calypso actions specifically targeting people living with disabilities

The following issues are assessed to be key factors for the success of any mechanism that could be implemented at the Calypso level for people with disabilities.

To improve tourism destinations' accessibility

The market trend shows the two main constraints of going on holiday faced by all segments of the adults living with disabilities target group are:

- The accessibility to tourism structures
- The information on the level of accessibility of these structures.

Regarding the accessibility of tourism facilities, few European countries have implemented specific norms and labels. Many European tourism buildings and sites are still not accessible to people with disabilities.

Different stages are necessary to attain a common level of accessibility and information in the European countries:

- The definition of disability, which should be based on the UN Convention on the Rights of Persons with Disabilities in all EU countries and expressed in European statistics figures.
- The legislation on the equality of rights of people with disabilities, which has not been passed in all European countries.
- The standards and laws regarding tourism building construction and tourism classification.
- The implementation of a common frame of references to all countries, according to standards already developed by national authorities, aiming at a unique European or at least Calypso label for accessibility of premises, facilities, services and information for people with disabilities.

Information and training of tourism sector staff

The improvement of accessibility in all participating countries is made through the awareness of the national public stakeholders and suppliers on the specific needs of people with disabilities. In the context of Calypso, a common frame of reference for the tourism and hotel industry's training courses can serve to improve the services offered to people with disabilities, irrespective of the target group. The suppliers engaging in Calypso will need to certify that staff and facilities meet the demands of the target group and that necessary support can be provided. As mentioned previously, people with disabilities generally prefer tourism in mainstream supply rather than specialised offers, so provisions need to be made for individualised travel rather than in groups.

To financially support the accompanying persons when needed

Segments of the adults living with disabilities target group cannot go on holiday without an accompanying person, which implies over-expenditure for the traveller. Besides the salaries/fees, the trip and accommodation costs of the accompanying person should be taken into account by any kind of financial support to people with disabilities.

5.1.6 Recommendations on Calypso actions for people living with disabilities

In addition to accessibility, the other needs of people with disabilities are specific to each kind of situation and depend on the kind of deficiency, the level of dependency (especially financial) and the social status. Apart from an accessible tourism chain and reliable information, finances, transportation and educated staff are the most often mentioned needs. For those who can travel individually, there is no major difference in travel habits compared to people without disabilities of the same age and social class, including in terms of seasonality (families in particular will travel during school holiday periods).

Among possible segmentations of the adults living with disabilities target group, the most practical segmentation in the framework of Task 2/Task 3 is between fully independent travellers (FIT) and people wishing to travel in groups, according to their financial situation. The tab below presents the possible actions that could be facilitated through Calypso.

In consultation with stakeholders, the following points have been specifically highlighted:

- Accessibility needs to be cross-cutting in any initiative, and not exclusive to actions directly targeting people with disabilities. At the same time, people with disabilities need to be separately targeted due to the high level of non-travelling adults today. People with disabilities are at higher risk of unemployment, poverty and marginalisation, which calls for specific actions targeting the group.

- The idea of Calypso is to provide opportunity for off-season prices at reduced prices, and with targeted support. In the view of most stakeholders, Calypso should mainly benefit people who otherwise do not travel, be it for financial, physical or social reasons. However, setting criteria for participation relating mainly to income (and thus need for specific subsidy) will greatly limit future Calypso actions, since future work will depend on participating countries subsidising outbound travel for participants. It is therefore the suggestion of the study to keep Calypso "open" and not employ strict criteria at the European level for participation or access to Calypso offers. The selection of participants should instead be up to each participating country and intermediary organisation, which can set the relevant criteria in the national context. Another important aspect is the social mix Calypso initiatives could encourage by having an open approach. The criteria that could be developed at a European level are explained in chapter 5.3.

- It is imperative that offers generated within the Calypso platform have a harmonised approach to accessibility and services offered. An outset can be to use one of the existing accessibility platforms described in section 4.1.3 to categorise and certify all Calypso destinations (not only the offers targeting adults with disabilities). An open access to a Calypso platform, for information purposes, would then serve to inform both travellers and intermediary organisations of the accessibility conditions at the venue.

Table 3: Calypso action for people with disabilities

			Possible Calypso actions	Possible Calypso mechanisms
Individuals	Financially independent	Information on accessibility	• Organise the information on accessibility to destinations and tourism facilities, and facilitate access to this information • Facilitate access to mainstream low-cost offers in Europe off-season	• Calypso platform with general public access for information
	With financial difficulties	Specific discounts Financial supports	• Organise the information on accessibility to destinations and tourism facilities, and facilitate access to this information • Facilitate access to mainstream low-cost offers in Europe off-season • National subsidy/support to traveller	• Calypso platform with general public access for information • Calypso platform with limited access for intermediary organisations presenting offers
Groups	All kinds of financial situations	Special groups offers	• Organise the information on accessibility to destinations and tourism facilities, and facilitate access to this information • Facilitate access to mainstream low-cost offers in Europe off-season • Facilitate access to specialised low-cost group offers in Europe off-season • National subsidy/support to traveller	• Calypso platform with general public access for information • Calypso platform with limited access for intermediary organisations

5.2   Seniors

In the European Union, there are currently different models targeted at senior citizens to enhance social tourism. Of the four Calypso target groups, seniors, together with young people, appear to be the ones generating more movement and initiatives. The communication and offers to the different groups must be customised, providing each group with a differentiated treatment due to its special characteristics. Examples of this would be the web-portal adapted to their needs with a language and specific interface for every group, as well as accommodation and offer on destination fully adapted to different requirements of its users, especially for seniors and persons with disabilities.

5.2.1   Features of the target and market size

The European senior population has continued to grow in recent years, as shown through the following graphics, and projections show they continue to grow in a significant way.

Table 4: Demographics of the senior European population[16]

(in % of the total population)	2010	2030	2050
80 years and more	4.60	6.85	10.80
75 to 79 years	3.60	4.70	5.60
70 to 74 years	4.25	5.60	5.90
65 to 69 years	4.70	6.30	6.20
60 to 64 years	5.70	6.90	6.40
55 to 59 years	6.40	6.80	6.10

This growth is accompanied by more sustainable domestic economies and a substantial increase in the quality of life, empowering the senior segment to develop activities of various kinds, including tourist activities.

Figure 3: Percentage distribution of the age in 2006 (persons aged 15 years and older)[17]
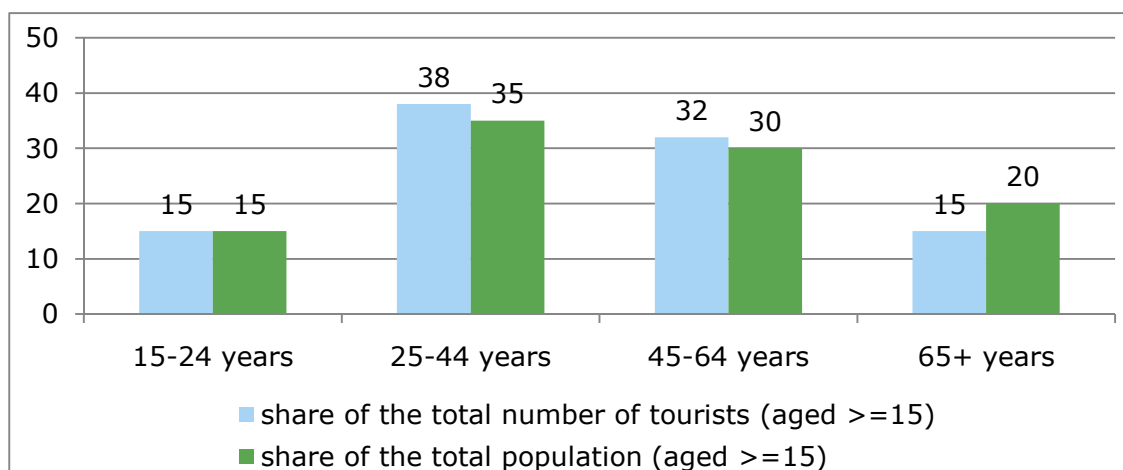
EUROPOP 2008 forecasts that in 2040, the percentage over 65 years old in the EU 27 will be increased to 27% and will reach 30% in 2060. If the growth potential of this group is added to the potential target itself, the potential of senior tourism is revealed as very strong. It can be concluded that senior tourism is possibly one of the segments with more growth potential over the coming years in Europe. At the same time, the attitudes toward age are changing over time. Senior citizens feel younger (on average 10-15 years younger than their "real" age), and due to this perception they also act accordingly by continuing an active life, including travelling, for several years after their retirement.[18]

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[16] Pyramide des âges, EU-27. L'Europe in chiffres - L'annuaire d'Eurostat 2009.

[17] Eurostat, Tourism Statistics / Population Statistics and Eurostat, Statistics in focus 69/2008. Tourism in Europe: does age matter?

[18] Pelz, Alexandra. Leisure time activities of the 50plus aged target group(s) under special consideration of exercise, sports and culture. Hans Schnait coop 50plus, Wien, June 2009.

5.2.2 Good practices analysis

To discuss the good practices of the 21 participating countries, a matrix has been built to objectively compare and assess the different practices presented in national reports. This has been developed in two versions, with the first being extensive and the second reduced more according to the information available. Please refer to the complete matrix in Annex C8.

Table 5: Good practices matrix for Senior Tourism

	Item	Countries							
		Austria	**France**	**Greece**	**Latvia**	**Portugal**	**Spain**	**Spain**	**Spain**
1	**Name of the programme**	Seniorenreisen Austria - Seniors' Travel Agency Austria	Seniors en vacances	TYPET (bilateral exchange programme between Portugal and Greece)	Holidays for senior citizens from Latvia to their selected European destinations	TYPET (bilateral exchange programme between Portugal and Greece)	IMSERSO Holiday Programme for Seniors	IMSERSO Transnational Programme: bilateral exchange of seniors	Europe Senior Tourism
2	**Target**	Austrian seniors in general and in particular members of the social-democratic federation of seniors, alone or with their partners.	Non-working seniors over 60 living in France. Also their partners, even if not 60, and people with disabilities over 55. Currently expected to reach 100,000 persons. 13,200,000 people over 60 (21.5% of population). Expected to be more than 25% of population in 2025.	No seniors specifically. Beneficiaries are families working in the Bank of Greece and families associated to the Portuguese INATEL Foundation.	Seniors. They represent 17% of the total population, and are 70% of the travellers in the country.	No seniors specifically. Beneficiaries are families working in the Bank of Greece and families associated with the Portuguese INATEL Foundation.	Seniors from the age of 65, with some exceptions, such as some widows, early retirees, partners as accompanying persons, or sons or daughters with certain disability (and as accompanying persons).	Seniors (depending on definition of IMSERSO - seen beside- and INATEL).	Seniors aged 55 or more and from certain countries (in this first year pilot).

		Countries							
	Item	**Austria**	**France**	**Greece**	**Latvia**	**Portugal**	**Spain**	**Spain**	**Spain**
3	**Main objective**	Group travels for seniors (30 persons and more).	Bring wellness to low income and isolated seniors, creating social links. Develop tourism economy.	Mutual knowledge of society, history and cultural heritage. Access to leisure in a cultural way in the framework of social tourism. Reinforce European citizenship.	Leisure travel of a group of seniors.	Mutual knowledge of society, history and cultural heritage. Access to leisure in a cultural way, in the framework of social tourism. Reinforce European citizenship.	2 objectives of social nature: improve the well-being of seniors and maintain employment levels in tourist areas during the off-season.	An objective of social nature: improve the well-being of seniors.	Travel of seniors bringing social benefits for the country of origin, and for employment in the countries of destination.
4	**Year of start up (approx)**	1970	2005 UNAT, since 2007 ANCV	1999	2001	1999	1985		2009-2010
5	**Countries involved – origin**	Austria	France	Greece	Latvia	Portugal	Spain	Spain and Portugal	Slovakia, Netherlands, Belgium, Poland, Slovenia, Hungary, Italy, Austria, Greece, Portugal, Denmark, France, Czech Republic, Romania, Bulgaria and Ireland.

	Item	Countries							
		Austria	**France**	**Greece**	**Latvia**	**Portugal**	**Spain**	**Spain**	**Spain**
6	**Countries involved - destinations**	Austria, Europe (including Turkey) - especially Croatia and Maghreb	France	Portugal	Europe: Czech Republic, Croatia, Norway, Scotland	Greece	Spain and some to Portugal and Andorra.	Spain and Portugal	Spain
7	**Kind of tourism**	Groups and all-inclusive.	All-inclusive holidays, with comfort of facilities, health centre nearby, activities and excursions.		Trips from 12 to 14 days.		Holiday stays with all-inclusive, cultural trips and nature tourism.	Holiday stays with all-inclusive, cultural trips and nature tourism.	Holiday stays with all-inclusive, as well as activities programme.
8	**Period of year**	Off-season: spring and March	Off-season: September to June		Peak season: March to September		Off-season	Off-season: October to May	Off-season: October to May
9	**Activities programmed**	Visits adapted to target groups, nurses and doctors, trips and entrance fees, destinations with sufficient quality level (assessed by the travel agency).	Cultural activities, excursions, sports, gastronomy, as well as programmes on themes concerning seniors and low-fat menus.				Medical services in the hotel and an activities programme.	Medical services in the hotel and an activities programme.	Activities programme

		Countries							
	Item	**Austria**	**France**	**Greece**	**Latvia**	**Portugal**	**Spain**	**Spain**	**Spain**
10	**Stakeholders**	Seniors, Pensionistenverband and the tourism sector in the destination country.	Agence Nationale pour les Chèques Vacances – ANCV.	INATEL Foundation in Portugal and Bank of Greece.	Group of seniors from Livani NGO White Hours (helps organise) and a tour operator from "Relax Tour" (organises transport in destination).	INATEL Foundation in Portugal and Bank of Greece.	IMSERSO (depending on the Ministry of Education, Social Policies and Sports), private companies organising the holiday shifts (after winning a bid in a public tender), hotels and other facilities in destination.	IMSERSO (depending on the Ministry of Education, Social Policies and Sports), INATEL FOUNDATION and private companies organising the holiday shifts (after winning a bid in a public tender), hotels and other facilities in destination.	Spanish government (Ministry of Industry and Tourism through Segittur) and other states. Private companies such as hotels and other facilities in destination, a Spanish travel agency who manages the holiday exchanges and other companies in origin.
11	**Stakeholders with agreements between**		ANCV, private stakeholders (mainly accommodation facilities), project leaders as local authorities, pension funds, healthcare plans.	A bilateral agreement between institutions is drafted, including hotels and group characteristics.		A bilateral agreement between institutions is drafted, including hotels and group characteristics.			

	Item	Countries							
		Austria	France	Greece	Latvia	Portugal	Spain	Spain	Spain
12	Management of programme	Pensionistenverband Österreichs (they guarantee the quality of the programme).	ANCV.		Seniors with the help of a NGO.		IMSERSO.	IMSERSO (and a private company licensed) and INATEL.	Zoetrope (in this first year), which is the private company licensed after a public tender for carrying out the management of the programme.
13	Promotion of programme	Seniorenreisen Austria.	ANCV.		Seniors with the help of a NGO.			IMSERSO and INATEL.	Spanish government through Turespaña and Segittur and regional governments involved.
14	Financing: how much	3% of the cost.	Public funding of 50% of the stay for non-taxable seniors.		Participants finance their trip; there is no subsidy mechanism or funding by any institution.		Approximately 30% of the total cost of travel, so almost 50% of what pay the participants.		The promoters finance the advertising of this programme, and the Spanish government provides €150 or €100 per participant depending on the country of origin.

	Item	Countries							
		Austria	**France**	**Greece**	**Latvia**	**Portugal**	**Spain**	**Spain**	**Spain**
15	**Financing: who pays**	Pensionistenverband Österreichs.	State				State through the Ministry.	States in both countries subsidise a set amount of the price.	The destination country benefitting from receiving tourists pays in destination.
16	**Financing: who receives**	Members of pensionistenverband get a 3% reduction on the price.	Create discounts on holidays and for lower incomes to give extra financial support. Participants pay only 50%.						
17	**Beneficiaries in origin**	Seniors, Pensionistenverband members, nurses and doctors, insurance agencies, transport agents.	Seniors						Seniors-holidays to promote happiness, health, reinforcement of European citizenship, travel agencies, transport companies.
18	**Beneficiaries in destination**	Accommodation, guides, other supply.	Private stakeholders because they can fill their spots off-season.						Hotels and other tourist facilities employment.

	Item	Countries							
		Austria	France	Greece	Latvia	Portugal	Spain	Spain	Spain
19	**Environmental sustainability**						"Sun and Beach" destinations are not the only ones included, as well as less requested destinations. So there's a revitalising effect on the different areas.		
20	**Social sustainability**		Employment off-season in the holiday resorts.				Direct and indirect jobs are created or maintained every year with a direct repercussion on the public administration income. No one is penalised for its geographical origin.		Direct and indirect jobs are created or maintained with a direct repercussion on the public administration income.
21	**Barriers and reasons for non-participation**	Health and financial difficulties.	Financial problems, support to family, increase of health budget, accessibility, and, depending on age and education, the fear of leaving home.						

The team has examined the schemes and experiences from the perspective of their potential transfer to a transnational exchange scheme for seniors meeting the values and objectives sought by the Calypso Preparatory Action. As a result of this analysis, it can be assessed the two models seeming to be most relevant with respect to tourism of senior citizens, and holding certain potential in terms of becoming Europe-wide or transnational projects, are the Bilateral Spain-Portugal Transnational Holiday Programme for Seniors and the Spanish Europe Senior Tourism.

The reasons to select these two initiatives are, amongst others, that they are successful experiences that have been working for some time, they mobilise a significant volume of persons, they are based on (bilateral) exchange schemes and transnational mobility, they promote economic activity and employment during the low season, and they have a clear social dimension in promoting European citizenship.

Although explained in detail in the section on best practices and the annexes of this report, the initiatives can be summarised as follows:

5.2.3 Spain- Portugal Transnational Holiday Programme for Seniors

It is a bilateral exchange of seniors between two national institutions, IMSERSO (Spain)[19] and INATEL Foundation[20] (Portugal). Target groups involved are seniors pursuant to the definition of each national institution organising the exchange.

It has been working as a bilateral transnational agreement since 1999. It is a reciprocal exchange: each institution selects the participants, Portuguese or Spanish, and finances the transport to destination, as well as accommodation and maintenance of those travelling. 4,000 people are exchanged per country and per season/year. Travelling takes place off season, from October to May, usually with an 8 days (7 nights) stay in low season.

In Spain, selection is centralised. Applicants request a seat in hierarchical order for several of the offers available. Selection is made by weighting the following criteria in order of importance: older age, lower income and not having travelled previously in the same programme. Complementary to the compulsory insurance policy, the presence of the following is guaranteed in the hotels of both countries: 1 doctor and 1 registered nurse for 1 hour per day during the 8 days of stay.

IMSERSO in Spain includes this exchange within its general offer of another well-known and exclusively national programme, Senior Holidays Programme, as a transnational destination, favoured by geographical proximity and the similarity of cultures and traditions. It should be pointed out that 1,200,000 people were able to take part in this programme during the 2009-2010 season, which is 200,000 more than the previous year. This Holiday Programme is highly demanded socially – more than two million people applied for seats during the 2009-2010 season - and a high level of satisfaction exists amongst those who took part in the programme. 308 hotels and 9,700 travel agencies have taken part this season. Since its creation in 1985, 11,200,000 people have benefited in total from this type of holiday. The Spanish State invested approximately €127 million in the last season; this amount financed 30% of costs, with the remaining 70% provided by users. According to the assessments made, this programme is sustainable from a financial point of view as the savings (in unemployment and other benefits) and income (VAT, income tax, etc.) generated allow for the recovery of the investment made. Return on investment is estimated at €1.53 recovered by the State for every euro invested.[21] During the 2009-2010 season, a flow of €690 million is estimated. Moreover, by being carried out during the low season, it has generated and/or maintained 119,000 jobs (16,000 direct and 103,000 indirect jobs), a figure which is significant since Spain, like other Mediterranean countries, strongly suffers from the effects of tourism seasonality with a fall in employment in this sector.

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[19] IMSERSO is the Management Organisation of the Social Security, belonging to the Ministry of Health and Social Policy.

[20] INATEL is the most important agent in Portugal from a social tourism perspective and is working for the Social Ministry of Employment and Social Solidarity

[21] "*Impact Assessment of the Holiday Programme for the Seniors from IMSERSO*". Price Waterhause Coopers. December 2008

Management of this programme in Spain is carried out through a licensed private company selected through a public tender. It is the same company that handles the entire Senior Holidays Programme.

In the case of Portugal, this exchange is part of the social tourism activities carried out by INATEL with programmes for each of the target groups selected by Calypso: young persons, seniors, persons with disabilities and low-income families. INATEL handles the issuing and receiving of participants through its own network of establishments and resources. In any case, INATEL covers 25% of seats with its network of hotels and establishments, and issues a public tender to offer the remaining 75% in collaboration with other private hotels.

Financing issues of the Transnational Exchange
In Spain, the Senior Holidays Programme is partially state-financed through the Ministry, with both the price and the subsidy granted by the State set, although the amount of subsidy varies depending on each modality and destination (destinations in the Balearic and Canary Islands are more expensive due to transport). The average subsidy for all modalities is approximately 30% of the total cost of travel, and almost half of what participants pay.

In Portugal, the State finances 45% of this Senior Tourism Programme; the remaining 55% is financed by the participants. As an example, the net cost for the INATEL Foundation was €313 per person in 2008. The price is progressive and proportional to each participant's income, where persons with lower incomes pay less, pursuant to the income statement presented to the State. The main benefits of the Senior Tourism Programme for the Portuguese economy may be classified as an increase in the production and marketing of goods and services, an increase in employment and performance, an increase in State recipes, an improvement in the economic structure and an increase in the enterprising spirit. **Taking these benefits into account, they may be quantified into direct, indirect and inferred benefits, considering the multiplying effects for the State, in the following way**[2]:
- **Production: for every euro invested, €1.702 are recovered**
- **Employment: for every euro invested, €0.035 are recovered**
- **Return for families: for every euro invested, €0.559 are recovered**
- **VAB: for every euro invested, €0.769 are recovered.**

5.2.4 Europe Senior Tourism Transnational Programme
Europe Senior Tourism Transnational Programme is a Spanish pilot experience that started in the 2009-2010 season. At this preliminary stage, other Member States have been invited to take part. It is managed by Segittur, a public company entrusted by the promoter of the Spanish government (Ministry of Industry and Tourism).

The beneficiaries must be citizens aged 55 and over and must live in one of the participating European Union countries. In this first year of the pilot experience, Spain, Germany, United Kingdom, Finland, Sweden, Estonia, Latvia and Lithuania were excluded. The beneficiaries must be able to care for themselves and not suffer behavioural ailments that may alter normal cohabitation.

An asymmetric cross-border exchange is initially expected, where every participating country will choose how to take part in the project:
- As acting agent: commits to subsidise citizens from other EU countries to travel to their country in conditions suitable for profitability
- As spectator agent: will only favour citizens to obtain social benefits from their own country to travel to other countries.

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[2] Values resulting from a *Study of Socio-economic Impacts of the Programa Turismo Sénior from 2001 to 2005.* Universidades de Aveiro. Departamento de Economia Gestão e Engenharia Industrial

In this first year, given the novelty of the programme and the low level of awareness, the participating countries have opted for the second, spectator figure.

Half of the seats are in Andalusia, with destinations in Costa del Sol (Malaga) and Costa de la Luz (Huelva-Cadiz) and the other half in the Balearic Islands, distributed amongst Majorca, Minorca and Ibiza. More than 50 4-star hotels in both regions have welcomed this pilot experience.

The exchange takes place from 1 October 2009 to 30 April 2010, that is, during the low season. The stays offered are for 8 days (7 nights), 15, 22 or 29 days. Travel includes transport, full board, and transfer from the airport of origin to hotel at destination and from the hotel to the airport of origin, activities programme and insurance policy. The operations company is obliged to subscribe extra insurance besides the regular insurance used in this type of travel

Management and organisation of the different holiday exchanges is carried out by a travel agency (Viajes Zoetrope) which has been licensed after a public call for tenders held with eight other wholesale companies in the country. There is no predetermined number of seats for each destination in the two regions. Viajes Zoetrope will allocate seats depending on requests.

The seats are sold through authorised travel agencies in each country and on the internet. Viajes Zoetrope is in charge of sale and distribution, reservations and verifying that customers meet the programme requirements. The licensed company, in collaboration with SEGITTUR, must carry out an advertising campaign in the media to boost the users' interest in the programme. Also, Turespaña, a state-owned company, allocates €1 million to carry out another campaign to make the project known in the European Union.

Approximately 45,000 users have been involved in this first year of the programme. The final investment made by the Spanish State amounted to €5.3 million. The Spanish Administration contributed to 22% of the total cost, whereas users contributed 78%. The subsidy from the Spanish State is destined for every booking made; that is, it is directed to the persons travelling and not the companies (hotels). However, the subsidy isn't paid directly to the persons but is a bonus on the price. In short, the Spanish State establishes an average price for the cost of the tourist package and then applies a discount or bonus of €100 or €150, depending on the country of origin. In this way, the final customer purchases the package with the applied discount/bonus, and thus it is the customer who benefits directly from the discount by purchasing the package at a lower price.

However, Zoetrope Travel Agency, as the operating company (selected as the best offer through a public call for tenders), handles and offers/sells the tourist package. It is the company that receives the subsidy amount (€100 or €150 per seat) once the accounts are settled for the tourists who actually arrive in Spain, <u>since the bonus is per, and for the, tourist</u>.

The results of the assessment on this first pilot experience are very positive[22]. Using contrasted methodology from previous studies in this sector, with direct and estimated figures, the assessment calculates that for every euro invested, the Spanish State has received (or recovered) €1.32 in taxes (VAT and other taxes as a result of economic activity) and other savings (social protection). Significantly, other European States/public administrations that have taken part in this pilot experience have also received (without contributing anything) an estimated €0.23 on average for every euro invested by the Spanish State. That is, **for every euro invested by the Spanish administration, there has been a total return of €1.55 overall.**

According to the assessment made, the impact of the Senior Tourism Europe programme on the EU economy is estimated to amount to €29 million. Of these, more than €22.5 million have been generated in the destination country, Spain, with an estimated creation of 609 direct jobs (almost 50% of which were created in the hotel sector). The results in the country of origin and at the European level are also significant (transport companies can pay taxes in other countries that do

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[22] "*Assessment on profitability and economic impact generated by the programme Senior Tourism Europe*", carried out by an independent consultant specialising in tourism. Innova Management. June 2010.

not take part in the Spanish programme): the economic impact at the origin amounts to more than €6.6 million, with an estimated 85 direct jobs associated to the programme. In terms of direct fiscal impact, administrations in other European countries are estimated to have collected approximately €1.2 million. This represents a collection of €27.48 per booking/travel made.

From the Spanish perspective, the result obtained regarding the foreign balance of payments is significant. The €5.3 million investment made has generated a surplus of €24.2 million in the balance per current account (that is, the difference between the income obtained and the payments derived from consumption of services – tourism, transport charter fees, insurance, services to companies, etc.).

Beyond these good national results, the programme intends to reinforce European citizenship in this target group, aspires to promote transnational exchange and contributes to maintaining the level of employment and economic activity in the sector during the low season. In summary, transnational exchange is promoted, although in an asymmetric manner in the travel conditions, number of travellers, travelling dates and the amount paid.

5.2.5 Stakeholders involved

The main institutional stakeholders working on senior tourism in each participating country are detailed in the table below. As can be seen in the matrix, the structures differ to a high extent between countries, from public authorities to associations and NGOs. In the countries already engaging in senior exchanges, semi public and private companies handle the exchange programmes, which could be a model to explore by other interested countries.

Table 6: National stakeholders in the field of social tourism for senior citizens

Countries	Stakeholder	Type of stakeholder	Responsibility with seniors
Austria	Pensionistenverband	Association	Informs and promotes travels, provides a reduction in price for members
	Seniorenreisen Austria	Private, depending on the Pensionistenverband	Travel agency from the Pensionistenverband, provides group travels for seniors, organises and manages them.
France	Agence Nationale pour les Chèques Vacances - ANCV	Public company, depending on the Minister of Economy, Industry and Employment and the Secretary of State in charge of Tourism	Responsible for the programme Seniors en vacances. Negotiate with stakeholders to put together holiday packages. Has developed complementary tools such as "Chèque Vacances" and specific programmes for different targets.
	Local authorities	Public	Partners of the programme Seniors en vacances inform beneficiaries and prepare stays with the help of ANCV.
	Pensioners clubs, pension funds clubs of seniors, social organisations	Private, Associations	Partners of the programme Seniors en vacances inform beneficiaries and prepare stays with the help of ANCV.

Greece	Families working for the Bank of Greece	Association	Promote exchange with INATEL Foundation in Portugal (families and seniors, working or having worked in the Bank), provide accommodation and organise the exchange.
	The Greek National Tourism Organisation (GNTO)	Public entity supervised by the Ministry of Civilisation and Tourism	Ruling state agency for the tourism sector in Greece. Its aim is to organise, develop and promote tourism in Greece. Plan and implement the programme Tourism for All (helps holiday making through coupons).
	Worker's Social Benefits Organisation and the Worker's Housing Organisation	Public entity supervised by the Ministry of Work and Social Security	One of its missions is to provide recreational activities such as vacations. Organises the Social Tourism Programme (also through coupons or vouchers).
Latvia	Group of seniors	Association	Since 2001, organises tours for themselves.
	NGO White Hours	Private, Association	Is a support for organisational aspects of the travel and assists in the accumulation of funds.
	Tour operator "Relax Tour"	Private	Tour operator that has become a stable cooperation partner for organising travels.
Portugal	INATEL Foundation	Private association, depending on the Ministry of Labour and Social Solidarity	Promote exchange with the Bank of Greece (families and seniors, working or having worked in the Bank), provide accommodation and organise the exchange, as well as promote exchange with IMSERSO in Spain.
Spain	IMSERSO	Public, depending on the Ministry of Education and Social Policy and Sports	Partially finances the programmes, ensures quality and supervises the supply.
	Mundosenior	Private company	After a public tender, it is the company that organises the holiday shifts for the IMSERSO Holiday Programme and the transnational programme with Portugal.

	Viajes Zoetrope	Private company	After a public tender, it is the company that allocate seats in the programme Europe Senior Tourism, manages and organises the different holiday exchanges.
	Travel agencies in the origin countries	Private companies	Authorised agencies in each country sell the seats for the programme Europe Senior Tourism.
	Ministry of Industry and Tourism	Public	Promotes the programme Europe Senior Tourism. Partially finances this programme
	Junta de Andalucía	Public, regional government from Andalusia	Partially finances the programme Europe Senior Tourism.
	Govern Balear	Public, regional government from the Balearic Islands	Partially finances the programme Europe Senior Tourism.
	Turespaña	Public company, depending on the Ministry of Industry and Tourism	Partially finances the advertising campaign for the programme Europe Senior Tourism.
	Segittur	Public company, depending on the Ministry of Industry and Tourism	Entrusted with the management of the programme Europe Senior Tourism

5.3   Young people

5.3.1   Features of the target and market size

The 18 to 30 years old group does not exist in official European statistics. The closest bracket for which statistics are available is the 20 to 29 years old group. Figures from 2007 (EU Youth Report 2009) indicate that some 66 million people aged between 20 and 29 reside in the European Union and that 96 million European inhabitants are between 15 and 29 years of age.

In terms of share of the population, youth represent about one-fifth of the total population (19.4%), with the proportion of young people aged between 25 and 29 (6.9%) slightly higher than the share of young people aged 20-24 (6.5%) and 15-19 (6%).

The share of youth aged between 15 and 29 in the total population at the national level ranges between 22% and 24% for the Baltic States (Estonia, Latvia and Lithuania), Cyprus and Malta, whereas it is less than 20% (average proportion at the European Union level) in Austria, Germany, Finland, Greece, Italy, Luxembourg, the Netherlands, Sweden and Belgium, Spain and the United Kingdom.

Figure 4: Young people as a share of total population

YOUNG PEOPLE (15-19, 20-24, 25-29) AS A SHARE OF TOTAL POPULATION, 01.01.2007
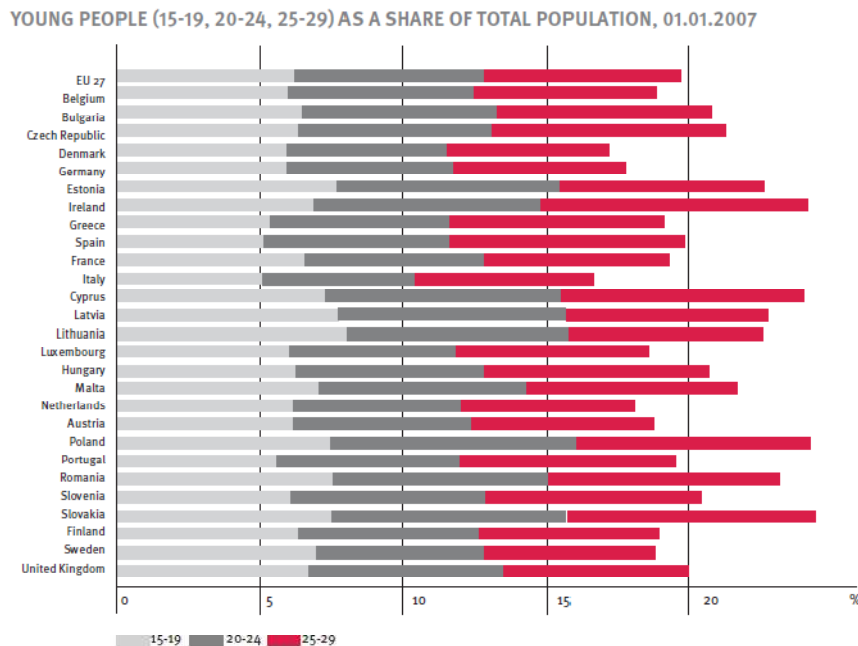
Sources: Eurostat - Demographic data

Eurostat demographic data base considers the 15-24 and 25-29 years old brackets and takes into account that the age of 25 represents a strong turning point in social and economic characteristics of young people. The 15 to 24 years old group represents 12.5% of the population of the European Union (27 countries: 497,649,125). The smallest proportions of young people in national populations are reached by Italy (10.2%), Spain (10.9%) and Greece (10.8%). At the opposite, three countries reached rates between 14% and 15% (Romania, Estonia, Poland), and the highest rates below 15% are reached by four countries (Slovakia, Cyprus, Latvia, Lithuania). Task 2 data collection per country showed that the national organisations in charge of young people use different age brackets to define the young people group. In that way, data coming from national studies do not allow a consolidation (see annex C10).

Diversity of situations in the 18 to 30 years old group
The age of 24 or 25 years old represents the major turning point of youth period, as the path from childhood to independent adulthood is lined with a number of crucial milestones and decisions, such as leaving the parental home to study or to work, moving in with a partner, getting married and having children. This process may vary significantly between and within countries:

- Young women tend to **leave the parental home** at the average age of 22 in Finland, and 29 in Italy, Malta, Slovenia and Slovakia. For young men, the average age ranges from 23 to over 30.
- The average age at which women have their **first child** ranges from 25 to 30 and has increased in all Member States over the 1995–2005 period. In Germany, Spain and the United Kingdom, first-time mothers over 30 are more numerous than their younger counterparts.
- In 2007, 20% of young Europeans aged 18–24 were at **risk of poverty**. Moreover, the average income of young people aged 16–24 is much lower than that of their elders aged 25–49, as young people still in education either have not started working or are at the beginning of their career.
- Most young people from 15 to 24 years old are still in **education** and, conversely, most people aged 25-29 have already gained a foothold in the labour market. In 2006, 15% of the population aged between 18 and 34 attend tertiary education. The median age of tertiary students varies widely across Europe, from 20 years in Greece to 26 years in Iceland.
- The path to the **labour market** can be straightforward (from formal education directly to full-time permanent employment or to inactivity) or more fragmented (combining schooling with part-time work and/or seeking work or alternating inactivity and work and/or seeking work).
  - Such diversity in patterns of transition from education to work is especially apparent among the population aged 18 to 24 years old. In 2007, 59% of young people aged 18 at the EU level were exclusively in education or training and only 13% in economic activity. By the age of 24, the proportions were reversed.
  - The employment rate increases with age. In 2007, it ranged from 37% (for those aged 15–24) to 75% for those aged between 25 and 29 years. But being employed does not mean that young people were no longer eager to study and learn; 14% and 12% of young employed Europeans aged 15–24 and 25–29 respectively were either still studying or stillin training.
  - A broad spectrum of results in terms of youth unemployment rate is reported in the EU Member States. In 2007, youth unemployment rates ranged from 8% to more than 20%. Moreover, in all Member States, young people tend to be more affected by unemployment than their elders. This pattern tends to be exacerbated by the current economic crisis.
  - 37% of temporary workers aged 15–24 and 65% of temporary workers aged 25–29 have a fixed-term contract because they cannot find a permanent job. In contrast to temporary work, a majority of working young persons aged 15–24 chose to work part-time in order to pursue their studies, which can explain why the share of part-timers is higher among the 15 to 24 year olds than among the 25 to 29 year olds.
- All of these economic and social situations, varying with age, strongly impact the capacity and availability of young people to go on holiday.
- Besides these differences, other factors play a role:
  - **Social and economic family background**[23]: holiday non-participation increases when family income is rather low
  - **National tourism uses**[24]: culturally young departure rates vary from one country to another. This rate is higher in Germany and the Netherlands (70% of young people aged from 18 to 25 year olds) compared to Spain and Italy (55%).

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[23] Carnet de route des 18-25 ans, ODIT France, 2007.
[24] Carnet de route des 18-25 ans, ODIT France, 2007.

These data show how difficult it is to grasp the youth as a target group. The diversity of profiles and situations strongly impact the level of income, available free time, social status and thus tourism practices.

The age of 25 year olds also frequently represents the most commonly shared superior limit, for example:
- Eurostat, like many national statistical agencies, build their demographic observations on two brackets: 18-24 year olds and 25-49 year olds.
- Air, train and bus transport companies choose the limit of 25 or 26 year olds for deals/discounts dedicated to young people.
- Cultural suppliers keep the threshold of 26 and/or 30 years old.
- European Youth Card EURO<26, recently the age limit for cardholders, increased to 30 years old.

5.3.2 Global tourism market trends

Profiles and motivations of young independent travellers[25]
Young people travel a lot and represent a large part of the worldwide tourism economy. Youth travel represents 20% of international tourist arrivals (160 million arrivals per year) and 18% of worldwide international tourism receipts. Europe represents 56% of the worldwide youth travel market. Young people have time to travel, but lack of money is a constraint, reducing the number of young travellers. The youth travel market is growing, and due to longer travel lengths, young travellers spend more than the average tourist during the trip.

Youth travel is a particular market; however, for the most part young travellers do not view themselves (self-description) as tourists because personal development and cultural dialogue are their major preoccupations instead of leisure. Only 23% of young travellers view themselves as tourists.

The desire to escape from the traditional travel labels is reflected in the large number of people preferring to create their own definition for their travel style. 25% of young travellers define themselves as "backpackers".

There are basically 4 types of young travellers:
- Backpackers
- Leisure travellers (short duration)
- Student travellers who are enrolled on courses in foreign countries
- Work travellers which often combine work and study travels

One of the effects of the growth in youth travel demand is that some of the constituent sectors of the overall market have become much more visible and clearly defined:
- Backpacking: reflects a long-standing tradition of long-term independent travel among young people from many mature origin markets
- Student travel: students are not travelling for leisure, but they are also increasingly studying and working abroad as well
- Work experience: is a rapidly growing market niche, which is becoming increasingly global. There is also an increasingly important market in 'gap year' travel, where young people entering higher education take a year off between high school and university
- Language learning: is a major youth travel growth market (see Figure 5).

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[25] Source: WYSE – WTO, "Youth Travel Matters. Understanding the Global Phenomenon of Youth Travel", 2008.
Statistics from the WYSE and WTO report collected with surveys leaded between 2002 and 2007 by WYSE and ATLAS. The email response questionnaire sent to members of WYSE Travel Conference generated over 2.300 responses in 2002 and 8.500 in 2007 (54,5% of respondent were European). The age ranges used to define youth tourism depend on the cases: 16-24, 16-29 or 16-35.

Figure 5: Motivation of young travellers
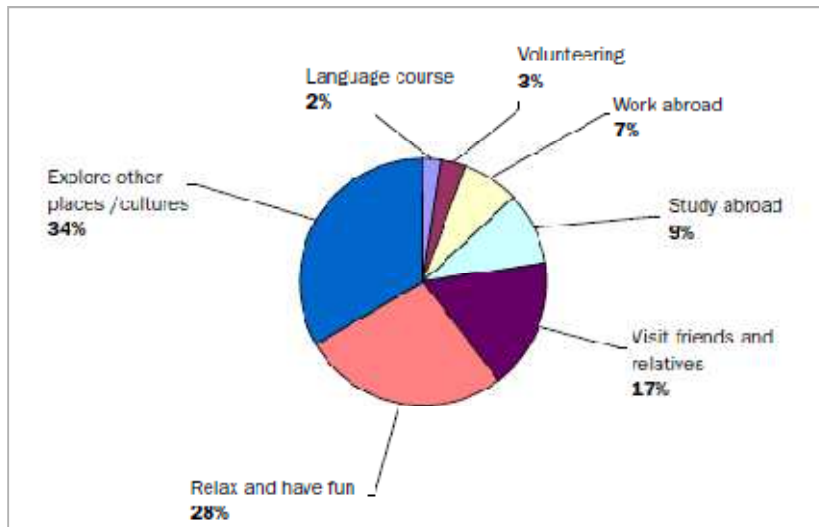
The above graphic shows that for 21% of young travellers, study abroad, work abroad, volunteering, and language courses, not tourism, are the motivations of travel . The major motivations for young travellers are cultural discovery and personal experience. Young people travel primarily to increase their knowledge of the world, and to meet and discover other people and other cultures: "Travellers generally found their trips to be personally, mentally, and to a lesser extent, professionally challenging". For young travellers, the travel is a way to become more open-minded, tolerant, curious, flexible etc.

The travel time becomes a time of experiment of the world which forms "global citizens". And "a thirst for more travel was the most frequently cited benefit of the trip, with over 80% of young travellers wanting to travel more on their return" (cf. Annex C12).

Figure 6: Motivation of young travellers for last big trip (scale 1 = of no importance, 5 = very important)
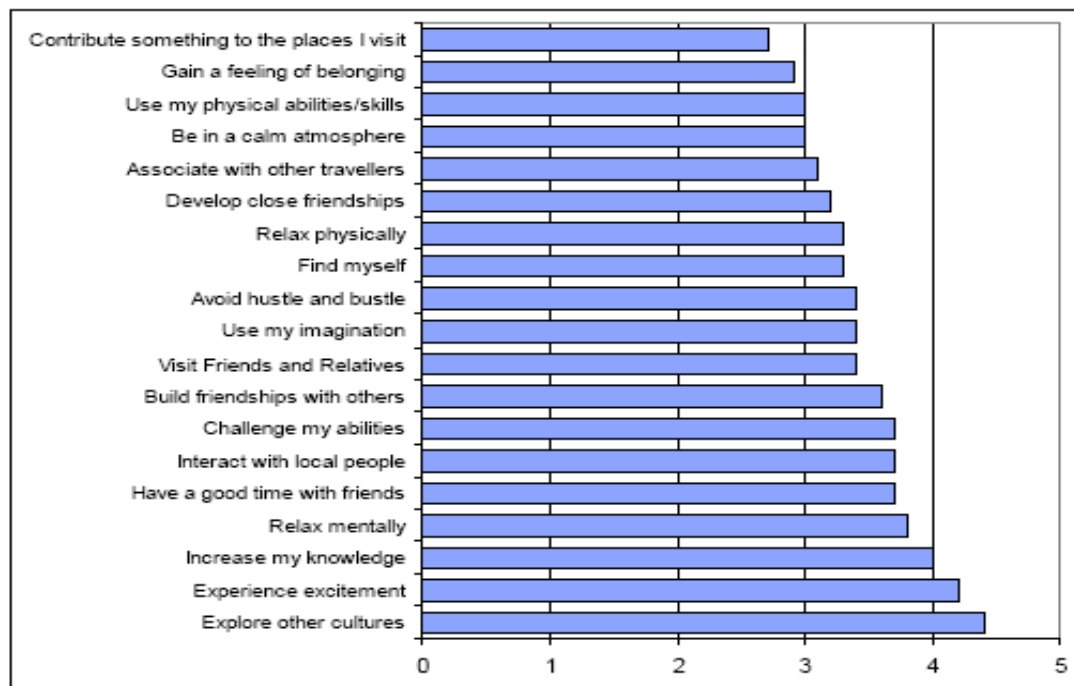
Source: ATLS & ISTC, New Horizons in Independent Youth and Student Travel

In line with general market trends in the tourism market, young people are taking more frequent and shorter trips (the number of trips of two weeks strongly increased in the last five years).

Considering all purposes of travel, the average length of the main trip lasts over 53 days (TRAM and WYSE[26]). More specifically, young people learning languages stay on the destination for five to six weeks, and young workers spend over 200 days in the country. Due to longer average trip duration than the rest of the population, a typical youth traveller spends more than the average tourist during his trip.

During the trip, the main forms of accommodation for young travellers are commercial accommodations for hostels (61.5%) and hotels (47.6%)[27]. Price is the major factor influencing travel arrangements.

Figure 7: Factors influencing travel arrangements on last main trip, 2007 (%)

Price	94.3
Quality of information and services provided by travel agency or product supplier	37.6
Reputation and quality of the travel products (airline, accommodation provider, etc.)	33.1
Flexibility to change my travel plans after purchase	30.7
Ability to book online	29.6
Speed and efficiency	24.0
Access to specialised student / youth travel products	21.1
Range of different products available	20.0
Reputation and quality of the travel agency (whether on-line or store-based)	13.5
Having a travel shop / agent close by	4.5
Buying a well-known brand	3.9

80% of young travellers use the internet to plan the trip and less that 20% consult a travel agent (cf annex C11). They book air travel and accommodation online, but travel agents are still consulted for surface travel, insurance and tour product sales. They consult a lot of information and use new technologies to stay connected with home.

Figure 8: Booking locations for travel products, 2007 (%)

	General Travel Agent	Specialised Student/Youth Travel Agent	Other Specialised Travel Agent	Directly with Product Supplier	Other
Air travel	21.2	47.2	6.1	22.9	2.6
Surface travel	13.2	25.5	6.7	46.8	7.7
Accommodation	8.9	23.1	6.8	46.4	14.7
Language course	6.6	20.0	9.2	47.8	16.4
Work abroad programme	6.5	24.0	10.7	40.2	18.7
Study abroad programme	5.8	18.6	5.4	48.2	22.1
Volunteer programme	5.6	22.6	8.1	40.5	23.2
Insurance	12.9	41.7	6.3	31.1	8.1
Tours	16.7	31.2	9.3	33.1	9.8

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[26] TRAM-WYSE, *The impact of travel experiences on the cultural, personal and social development of young people*, 2006. Document created with results of various studies leaded by ISTC.
[27] WYSE – WTO, Youth Travel Matters. Understanding the Global Phenomenon of Youth Travel, 2008.

Figure 9: Method of booking used for last main trip

	Online (%)	In a travel agency (%)	Phone or fax (%)
Air travel	51.7	38.3	10.0
Surface travel	48.6	40.6	10.8
Accommodation	63.5	21.2	15.3
Language course	54.9	27.9	17.1
Work abroad programme	57.1	25.4	17.5
Study abroad programme	55.7	24.8	19.6
Volunteer programme	58.3	24.5	17.1
Insurance	45.9	39.5	14.6
Tours	41.2	47.4	11.4

Crisis consequences
Youth tourism has been affected by the economic crisis, but negative impacts are less important than for tourism globally. According to Wyse Travel Confederation in the Youth Travel Industry Monitor of September 2009, the demand in July-August 2009 decreased by 5.1% compared to 12 months ago. The principal sectors concerned are language study, and work and experience volunteer travel. To solve this problem of demand decrease, adopted solutions have been decreases in prices and diversification of products. The European situation is good in this crisis context. Young demand did not decrease by much.

Sustainable tourism[28]
Youth travellers are preoccupied by social and environmental questions. They want to find the fair balance between their need for travel and environmental protection. They are looking for solutions to mitigate their impact. Young people travel in order to meet other people, so the social aspect of the sustainable tourism particularly concerns this target. The environmental impacts of young travellers are less important than of the average tourist. In a 2007 survey of Lonely Planet about Travellers Pulse, 93% of the respondents affirm that they would or might purposefully partake in environmentally friendly travel in the future.

5.3.3 Main findings in the participating countries

Table 7: Seasonality and main barriers for young people

Country	Main destinations abroad	Seasonality	Main barriers
Austria	Italy and Southern Europe	Off season is preferred	Financial difficulties
Belgium	Neighbouring country	Mostly high season	Financial constraints
Bulgaria		During summer or winter	Financial constraints
Croatia	European cities and nearby destinations	Mainly during summer, all the year for city breaks	Financial reasons, especially for transport Lack of time for students Career
Czech Republic	Destinations offering studies of language and work & travel programs	July and August	Financial constraints
Cyprus	Greek islands	Summer period	Financial constraints and lack of free time, both for students and workers Geographical distance from Western Europe

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[28] Source: WYSE: Climate change and youth travel industry guide, October 2007

Country	Destinations	Seasonality	Constraints
France	Mainly neighbouring countries	60% of the stays during peak season	Lack of resources (especially for transport costs) Socio-economic back ground of the family Lack of time and difficulties to anticipate Lack of information on products specifically dedicated to youth
Greece	Mediterranean countries and European capitals	Mainly high season, then official holidays	Mainly financial constraints for students, new workers and unemployed Lack of time as they are entering or in transition to enter in professional life Social and family background
Hungary	Greece, Croatia, Romania, Austria	High season	Financial reasons Lack of free time because of school
Italy	Spain, Great Britain, France, Germany, Holland	All year round, but constraints linked to work and school	Financial constraints Lack of free time
Ireland	Not known	Not known	Not known
Latvia	Armenia, Azerbaijan, Albania, Georgia, Moldova, Romania Italy and Spain for studying language	Seasonality is not so important Official holidays remain the main departure periods	Lack of free time, young combine studies with work Financial reasons
Lithuania		No specific seasonality aspects, except for the students, who are free from their studies during the summer months	Lack of information and lack of money
Malta	Italy, UK, Germany, France	Summer months	Financial reasons depending on the status (student, employed, unemployed)
Poland	Germany, Slovakia, UK, Italy, Austria, Czech Rep	July, August, September	Place of residence (urban/rural) Educational level and family financial resources
Portugal	Not known	Summer months, December, Easter	Economic constraints or geographic obstacles (rural areas)
Romania	Bulgaria and Greece European City breaks		Financial reasons Lack of information Lack of free time because of school or summer job
Slovakia	No data	No data	No data
Slovenia	European destinations: Croatia, Greece, Spain, Italy	High season	Lack of free time (study and student work) Financial reasons, especially for transport and accommodation
Spain	Significant preference for Latin countries (Italy, France)	High season	Economic difficulties Socio cultural and family background
Turkey	European countries	High season	Financial reasons Visa restrictions

In almost all countries (except Austria, Latvia and Lithuania), summer period is preferred for youth holiday. In most cases, this is even the only period possible because of school/university schedule constraints. Preferred destinations are mainly inside the country and the neighbouring countries.

Main barriers are financial difficulties and lack of free time. Then, other possible barriers to go on holiday are the socio-cultural background and the lack of information.

From the country researches, very few good practices have been identified in the field of youth tourism exchanges during the off season. Some programmes help young people go abroad, but their specificity and perimeter of action do not allow extending such mechanisms at the Calypso level.

Stakeholders per country
The table below presents the main stakeholders working on youth travel per country.

The consortium's recommendation is that initiatives could rely on both Eurodesk and WYSE existing networks for Calypso actions. Eurodesk is a non-profit-making international association. The Eurodesk European network is established as a permanent support structure of the Youth in Action Programme of the European Union to:
• Facilitate access to European information with respect to the mobility of young people, more specifically in education, professional training and culture
• Supply and enhance European mobility information and counselling services for young people and those who work with them
• Cooperate with European institutions, networks and associations in this area
• Supply information about possibilities of European funding.

The Eurodesk network counts national coordinators in 31 Europeans countries, including 18 Member States participating in the Calypso study (except Croatia and Cyprus) and Turkey. The Eurodesk European Office is the coordinating body at the European level in charge of European information and data base management, development of the web site (see annex C13), communication, coordination and animation of the network, and development and innovation in the youth information field and secretariat.

Eurodesk national partners are nominated by governmental authorities of each country. They are responsible for promoting and delivering European information services to the target group. Regional level partnerships are decided by the Eurodesk national partners for each country.

The World Youth Student & Educational (WYSE) Travel Confederation was founded with the merger of the Federation of International Youth Travel Organisations (FIYTO) and the International Student Travel Confederation (ISTC). The Confederation's mission is "to increase international understanding through the promotion of travel and educational opportunities for students and youth". WYSE Travel Confederation's 550+ members are active in 118 countries. Members of the Confederation work through specialist sector associations to provide services and products for young travellers around the globe, including Student Identity Cards, Language Travel Experiences, Work Exchange and Au Pair Experiences, Student Flights, Youth Accommodation and Travel Insurance.

All Calypso participants, except Cyprus, have several WYSE members. The amount of members totals 170 in the participating Calypso countries (from more than 20 in France, Italy, Ireland, Spain, to less than 5 in others). WYSE should not hold Calypso actions but this strong network and the important number of members might be an important support.

Table 8: National level stakeholders in the field of social tourism targeted at young people

Country	Stakeholder	Type of stakeholder	Responsibility with youth
Austria	Osterreichische Jugendvertretung	Federation	National Youth Council Federates organisations
	Jugendinfo.cc	Association of the Austrian Youth Information Centres	Austrian National Agency for the European network of information service EURODESK, which is supported by the European Commission and the Austrian Federal Ministry of Economy, Family and Youth
Belgium	Ministry of Youth of the Belgium French Community	Public	
	Ministère flamand des Affaires intérieures, de la Culture, de la jeunesse et de la fonction publique	Public	
	Youth International Office -BIJ	Association	Eurodesk Belgium – Regional coordinator
Bulgaria	Ministry of Economy, Energy & Tourism	Public	
	NAYT	Association	National Association for Child's and Youth Tourism, which represents interests of this target and government policy
	National Centre European Youth Programmes & Initiatives		Eurodesk Bulgaria – National coordinator
Croatia	Croatian Youth Hostel Association	NGO	Independent association of youth hostels Provides information about travelling and destinations, sales youth cards
Cyprus	Cyprus Youth Board	Semi-governmental organization	Youth policy Sponsors programmes focused on culture and education
Czech Republic	Ministry of Education, Youth and Sports	Public	Youth policy
	Ministry of Labour	Public	Supports unemployed youth
	Eurodesk - NA Mladez/ NIDM MSMT		Eurodesk Czech Republic – national coordinator
France	Ministry of Youth and Sports	Public	
	CNAJEP	Association	Youth and community education organisations
	INJEP	Association	National Institute of Youth and Community Education
	CIDJ	Association	Network which informs young people about studies, jobs, and holidays. Eurodesk France – National coordinator
	ANCV	Public body	Holiday package
Greece	General Secretariat for Youth - Ministry of National Education and Religious Affairs	Public	Implements national youth policy Eurodesk Greece – national coordinator

	National Hellenic Youth Council - ESYN	NGO	Federation of Greek youth organisations
Hungary	Ministry of Social Affairs and Labour	Public	Supports programmes, supply information centres and organises camps
	Mobilitas National Youth Service		Eurodesk Hungary – national coordinator
Ireland	Department of Health and Children, Youth Affairs section	Public	Supports and promotes non-formal education and learning
	National Youth council		Federation of youth organisations
	LEARGAS		Eurodesk Ireland – national coordinator
Italy	CTS		Young Tourism Centre
	AIG	Association	Italian Youth Hostel Association
	Eurodesk Italy		Eurodesk Italy – national coordinator
Latvia	Ministry of Science and Education – Department of Youth policy	Public	Responsible for making and implementing the national policy
	Latvian Youth Council	NGO	Umbrella organisation, acts as platform for representing interests and exchanging of information
	AEGEE Riga	Association member of AEGEE	Exchange of information on cheap travel opportunities
	Agency for International Programmes for Youth		Eurodesk Latvia – national coordinator
Lithuania	Youth Affairs Dept – Ministry of Social Security and Labour	Public	
	Lithuanian Youth Council (LiJOT)		Biggest non-governmental, non-profit umbrella structure for Lithuanian national youth organisations Eurodesk Lithuania – National coordinator
Malta	Ministry of Education, Culture, Youth and Sports – Parliament of Youth	Public	Develops the national youth policy ('Youth in Action' support)
	European Union Programmes Agency		Eurodesk Malta – national coordinator
Poland	Foundation for the Development of the Education System National Agency of the Youth Programme		Eurodesk Poland – national coordinator
Portugal	Movi jovem - Pousadas de Portugal	Association	The National Network of Youth Tourism
	National Agency for Youth Programme		Youth in Action and Eurodesk Portugal – national coordinator
Romania	Ministry for Education, Youth, Sport and Research	Public	Youth camp organisation and management
	ANPCDEFP - National Agency for European Programmes on		Eurodesk Romania – national coordinator

	Education & Vocational Training		
Slovakia	Ministry of Education – Department of children and youth	Public	Support of youth policy Prepares a youth support development programme
	Iuventa		Eurodesk Slovakia – national coordinator
Slovenia	Office of Youth – Ministry of Education, Science and Sport	Public	Monitors the situation of young people, implements measures in education, leisure, integration Implements international programmes and supports youth hostel network
	MOVIT NA MLADINA National Agency of the Youth in Action Programme		Eurodesk Slovenia – national coordinator
Spain	INJUVE	Public	Youth institute of the Ministry of Equality (in charge of 'Youth in Action' programme)
	Youth Institute International mobility & information service		Eurodesk Spain – national coordinator
Turkey	Directorate General for Youth and Sports	Public	Organise activities to value youth spare time in social, cultural, and sports fields
	Gençtur	Private	Leading youth travel agency
	Board of Prime Ministry for Higher education scholarships and dormitories	Public	
	Ministry of education	Public	Organise youth summer camps
	Eurodesk Turkey		Eurodesk Turkey – national coordinator

5.3.4 Existing supply for youth travel: tourism or not?

Youth tourism market trends (see 5.3.2) show the major motivations for young travellers are cultural discovery and personal experience, and that young travellers mostly do not view themselves as "tourists".

Nevertheless, besides this self-description, 80% of motivations for travel remain typical tourism motivations: visit friends and relatives, relax, have fun, explore other places and culture. 20% of travels can be considered as "mainly non-tourism" since the main motivation is study abroad, work abroad, volunteering, and language courses. Among these "mainly-non-tourism" youth travels, many programmes and mechanisms already exist at the European level (DG EAC, European Federation for Intercultural Leaning, European Council and Youth and Sport DG) so as to give access to young people related to learning, education, citizenship, European open-mindedness, etc. These existing mechanisms involve well-structured stakeholders and cover the needs of this market segment of non-formal learning experiences (main non-formal learning offers being: au pair, language courses for foreigners, staying with families, voluntary services and work camps, international youth meetings, cultural events and sports meetings, practical placements, high school or university visits, seminars on various topics, and study trips). There is no evident added-value for Calypso to work on this market segment.

Main non-formal learning offers:

- Au pair: As an au pair, youth look after the children of the host family and help with daily chores around the house. The family provides the youth with room and board, and gives pocket money. With five to six working hours a day, one day off per week and a maximum of two or three evenings of baby-sitting, there is enough free time, e.g. to attend a language course.
- Language courses for foreigners: In holiday language courses, young people from all around the world can not only learn a language, but they can get an insight into the country's culture and history. On some of these occasions, foreign language courses for foreigners are held at the same time so that young people have the opportunity to get to know each other in their spare time.
- Staying with families: Living with a family is an opportunity for young foreigners to experience everyday life in a country – be it two weeks or an entire year. And a language is easiest acquired by being forced to speak it around the clock.
- Voluntary services and work camps: There are many opportunities for improving language skills, getting to know new people, or developing a taste for work: e.g. a work camp renovating a monastery, working at an agricultural cooperative or helping at an environmental protection project planting greens on the dunes on the shores of the sea. Work camps may last from two to four weeks and voluntary services from three months to one year.
- International holiday and sports meetings: International holiday and sports meetings are youth contacts open to like-minded young people of different nationalities focusing on games and sports, discussions and other joint activities. Since in most cases the return trip to attend these events is made by coaches and since accommodation is in tents or youth clubs with simple overnight facilities, taking part is not very expensive.
- International youth meetings and cultural events: Young people from different countries come together in order to take part in an activity under a given theme, such as to jointly practice a hobby or to acquire a new skill - be this horseback riding, in-line skating, singing, drumming, computer work or photography. There are bi-, tri- and multilateral youth meetings.
- Practical placements: A practical placement means getting a feel of work life. An internship in a foreign country teaches something about the specific work and life habits of that country and improves the language skills.
- High school or university visits: Young people have the possibility to attend high school- or university-courses in a foreign country for about three to ten months. The school visit is usually combined with a home-stay with families.
- Seminars on various topics: Each seminar deals with a specific topic – e.g. graffiti, travelling, public speaking, techno music, or politics – that can be approached in a variety of different ways: use of various media, theatre, excursions or games.
- Study trips: Study trips focus on visiting and getting to know towns and cities, cultural centres or places situated in a particularly attractive countryside.

Main tourism and travel suppliers

International discount cards

Several international discount cards target young travellers: ISIC (International Student Identity Card), IYHF (International Hostel Association), IYTC (International Young Travel Card), and EURO 26. According to the WYSE survey[29], over 60% of respondents obtain some kind of student discount on their trip. Air travel is the most frequent source of discounts (46%), followed by surface travel (43%) and accommodation (40%). In terms of the specific discount cards used, the International Student Identity Card (ISIC) was the most well-known and widely used card among survey respondents.

The EURO 26 is run by the European Youth Card Association (EYCA), which represents 62 youth card organisations in 41 European countries and issues the EURO 26/European Youth Card to over 4.3 million young people under 26 or 30 years old, depending on the national organisation (see country reports in annex B). The protocol of Lisbon defines the reciprocity of discounts. The

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[29] WYSE – WTO, "Youth Travel Matters. Understanding the Global Phenomenon of Youth Travel", 2008

card provides 100,000 discounts in 38 countries on different fields (each participating country offers an average of 1,847 discounts), such as culture, transport, travel, shops and services. The web site provides information through different filters (by country, region, city, type of product), the list and information on the different service providers/suppliers, such as name, contact, and amount of the discount. In the age group 25 to 30 years old, there is a strong trend to use the card abroad, as young adults are most likely to participate in exchange programmes.

Youth hostels

The European Union Federation of Youth Hostel Associations (EUFED) is the main hostel association in Europe. EUFED is an NGO linked to the EU institutions created in order to support and develop the Youth Hostels Movement (see full description in annex). It is affiliated with the International Youth Hotel Federation. EUFED represents 22 youth hostel associations across 19 European countries, operating 1,800 youth hostels, serving 2.8 million members and recording more than 23 million annual overnight stays within Europe. EUFED led different programmes in increasing the mobility of the young and empowering young people to go abroad. For example, it led Eurocaching, FAB holidays, young mothers and young fathers and sons camps, etc. EUFED cooperates with the EU for innovative programmes like EVS (European Voluntary Service for young people from 18 to 25) of the Youth in Action Programme.

EUFED, which is part of the Calypso working group and answers to the demand of propositions by the European Commission, has proposed a pilot project in association with the BITS– Europe for All: Youth 'Cultural Encounter'. By using the existing network of Youth Hostels (see synthesis in annex C13), the project aims at allowing groups of young people aged 18 to 30 years and coming from under-privileged social classes to make a one-week cultural and language stay in another European country. EUFED and BITS have estimated the total cost of the project to be €579,000 for 1,000 participants (50 groups of 20 young people), requested from the EU budget. This project is focused on European social tourism and led by strong and serious European stakeholders that have a strong knowledge of the target and their needs. As the project is entirely financially supported by the EU, it doesn't correspond to the Calypso level.

The other suppliers in youth hostels are mainly online selling platforms, for example:

Hostelworld.com provides online confirmed bookings for hostels, budget accommodation centres and package tours, as well as comprehensive content such as city and country guides. There are 10,000 properties in 160 countries, over 2,000 partner sites, and about 80,000 beds booked per day. The company connects customers to hostels for low commission levels.
- For independent travellers, the website provides:
  - Online booking service for hostels and budget accommodation of all types worldwide;
  - Description and presentation of hostels and other accommodation featured on the website;
  - Response to customer queries and complaints and provision of travel information.
- For hotel owners and operators, the website provides:
  - Service to sell beds online;
  - Global distribution network for hostel beds;
  - Marketing and communication power.

Hostels of Europe

Hostelseurope.com offers users a selection and description of over 3,000 hostels around Europe, all of which can be booked online through the website (10% deposit paid with credit card for booking).

InterRail

Interrailnet.com is the joint InterRail webshop of 30 European railways. It provides up-to-date information and sales of all InterRail Passes to customers from all over Europe. The InterRail Global can only be used by European residents and is valid for train travel in 30 countries. Travel durations vary from five days to one month. There are several price levels depending upon age and preferred class. For the 18-30 age group, two types of passes are offered (see annex C13):
- Global Pass Youth: 12 up to and including 25 years old;

- Adult Pass: 26 and older on the first day of travel.

Eurolines
Eurolines is the brand under which more than 32 companies across Europe work together to provide the extensive coach network in Europe by connecting over 500 destinations. Eurolines offers preferential prices and passes for 15 or 30 days trips to young people up to 26 years old (see annex C13).

Other stakeholders and European programmes

Youth in Action
Youth in Action is the EU programme for young people aged 15-28 (in some cases 13-30), with a budget of €885 million for seven years. It is managed by DG Education and Culture and established for the period 2007-2013. It aims at inspiring a sense of active citizenship, solidarity and tolerance among young Europeans and at involving them in shaping the EU's future

The Youth in Action programme promotes mobility within and beyond the EU borders, non-formal learning and intercultural dialogue, and encourages the inclusion of all young people, regardless of their educational, social and cultural background.

There are 4 programme priorities:
- European Citizenship;
- Participation of Young People;
- Cultural Diversity;
- Inclusion.

In addition, there are annual priorities (2009 examples: European year of creativity and innovation, sport as a tool to promote active citizenship and social inclusion of young people, promoting the inclusion of young people with disabilities, intercultural dialogue).

Programme priorities are divided into five actions (see annex C13):
- Action 1: Youth for Europe, which encourages young people's active citizenship, participation and creativity through youth exchanges, youth initiatives and youth democracy projects. Among this action's three types of activities, youth exchange activity puts groups of young people from different countries together so they can explore their social and cultural differences and similarities through a study in European country and linguistic exchanges.
- Action 2: European Voluntary Service
- Action 3: Youth in the World
- Action 4: Youth Support Systems
- Action 5: Support for European cooperation in the youth field

The European Youth Forum
This organisation is an independent and democratic platform representing youth assemblies and NGOs. It defends youth interests in the world, as well as supports EU programmes in favour of young mobility (formal or non-formal education travel) and initiatives in favour of sustainable development. It organises conferences or meetings but does not have a financial programme encouraging youth tourism. The European Youth Forum forms a dialogue between EU institutions and work teams about youth policies. EYF priorities are education, youth work development, human rights, participation and youth policy mainstreaming, and employment and social affairs.

European Federation for Intercultural Learning
EFIL is the umbrella organisation of 22 AFS organisations in Europe. AFS (formerly American Field Service) is a non-profit volunteer-based educational organisation offering educational exchanges for young people around the world. EFIL member organisations participate in a network of partner organisations running long-term intercultural exchanges between almost 80 countries worldwide. Their priorities are peace, education, cultural exchange, and European construction. It creates networks and lobbying groups, as well as organises dialogue meetings such as the education conference "Moving Beyond Mobility: Intercultural Learning through Youth Exchange".

European Youth Foundation

The European Youth Foundation is a fund dependent on the European Council Youth and Sport DG created "to encourage cooperation among young people in Europe by providing financial support to European youth activities serving the promotion of peace, understanding and cooperation". It finances activities, projects, meetings, and studies about youth. There are four types of financed projects:

- International youth meetings (camps, festivals, seminars, workshops, etc.);
- Youth activities other than meetings;
- Administration of international non-governmental youth organisations and networks;
- Pilot projects.

Eurodesk

Eurodesk is a non-profit international association. The Eurodesk European network is established as a permanent support structure of the Youth in Action programme of the EU to:

- Facilitate access to European information with respect to the mobility of young people, more specifically in education, professional training and culture;
- Supply and enhance European mobility information and counselling services for young people and those who work with them;
- Cooperate with European institutions, networks and associations in this area;
- Supply information about possibilities of European funding.

The Eurodesk website is mainly dedicated to those looking for information on financial support for projects/activities involving young people, especially professionals in the youth field.
The Eurodesk website is an information portal for:

- Global information on youth policy;
- EU opportunities: list and details of funding opportunities for which to apply (grants, programmes, traineeships, awards and prizes, courses);
- Information and links to other European stakeholders and programmes involved in youth programmes: European Youth Portal, ERYICA, EYCA, AEGEE (European student Forum), ECYC (European Confederation of Youth Clubs, ESN Erasmus student network, EUFED, European Youth Forum, INJEP (Institut national de la Jeunesse et de l'Éducation populaire), YONET (Youth Opportunities Network);
- Links to find European news (magazines, newspapers, web sites, etc.), information relays, tools for training sessions, workshops or conferences, list materials (documents, publications, leaflets, videos, training packs, web sites, etc), partners;
- Discussion forum, question/answer platform.

ERYICA – European Youth Information and Counselling Agency

The European Youth Information and Counselling Agency (ERYICA) is an international non-profit association. The ERYICA network consists of 26 Member States, 4 affiliated organisations and 3 cooperating organisations. These organisations work in 26 countries in more than 8,000 youth information centres, where 13,000 workers provide young people with generalist information under the principles of the European Youth Information Charter. The ERYICA network is composed of national youth information coordination bodies and networks. It works to intensify European cooperation in the field of youth information work and services. It aims to develop, support and promote quality generalist youth information policy and practice at all levels in order to meet the information needs of young people in Europe and to apply the principles of the European Youth Information Charter.

5.3.5   Possible Calypso actions for young people

Youth targets are made of many different segments according to the economic, social, and family situations, varying with age, which strongly impact the capacity and availability of young people to go on holiday. The table below presents the main features and barriers to go on holiday according to 7 target segments, more or less autonomous or facing social difficulties, with the possible actions that could be achieved by Calypso.

Target segments		Main features & barriers of going on holiday	Needs in order to increase travel practices	Possible Calypso actions	Possible Calypso mechanisms
Autonomous	Young workers	• Few barriers to go on holiday • Familiar with holidays, internet and booking process • Difference of income level, matrimonial status, etc.	• Discounts (cards, work councils, offers, etc.) • Low cost packages	• Facilitate access to mainstream low-cost off-season offers in Europe	• Calypso platform in the 'language of young people' with general public access
	Students with income	• Few barriers • Access to student programmes and information • Familiar with holidays, internet and booking process • Lack of free time (studies but also work in some cases) • Constraints of school/university schedule	• Discounts (cards, work councils, offers, etc.) • Information on travel opportunities, in particular informal learning opportunities	• Facilitate access to mainstream low-cost off-season offers in Europe • Facilitate access to the information on existing supply and European programmes for youth	• Calypso platform in the 'language of young people' with general public access
Transition	New young workers	• Financial barriers • Other priorities to start in life (home, car, etc.) • Few holiday days	• Financial support (and information about existing supports) • Discounts (cards, work councils, offers, etc.) • Low cost packages	• Subsidise off-season holidays abroad • Facilitate access to mainstream low-cost off-season offers in Europe	• Calypso platform in the 'language of young people' with general public access
	Students with low income/ grants	• Financial barriers • Access to student supports, programmes, internet • Lack of free time (studies but also work in some cases) • Constraints of school/university schedule	• Financial support (and information about existing supports) • Discounts (cards, work councils, offers, etc.) • Information on travel opportunities, in particular	• Subsidise off-season holidays abroad • Facilitate access to mainstream low-cost off-season offers in Europe • Facilitate access to the information on existing	• Calypso platform in the 'language of young people' with general public access

	Apprenticeship, part time job, etc.	• Financial difficulties • Lack of free time • Problem with information access	informal learning opportunities	supply and European programmes for youth	
Facing social difficulties	Unemployed young people	• Strong financial difficulties • Lack of free time (time used for employment research) • Problem with information and Internet access	• Financial support (and information about existing supports) • Discounts (cards, work councils, offers, etc.) • Information on travel opportunities, in particular professional and informal learning opportunities	• Subsidise off-season holidays abroad • Facilitate access to mainstream low-cost off-season offers in Europe • Facilitate access to specialised very low-cost off-season offers in Europe • Facilitate access to the information on existing supply and European programmes for youth	• Calypso platform in the 'language of young people' with general public access • Calypso platform with limited access for intermediary organisations
	Isolated/marginalised disadvantaged youth	• Strong financial difficulties • Difficult social background • No habit of going on holiday • Strong difficulties for information and internet access	• Financial support (and information about existing supports) • Consciousness-raising campaign and programmes • Accompanying in holiday preparation • A specific information approach where information goes to the beneficiaries (via staff who go to inform in youth clubs, associations, etc.) because they don't go to information • Very low cost packages • Group travel offers	• Subsidise off-season holidays abroad • Support the intermediary organisations (public national/regional/local authorities, not-for-profit associations, social workers etc.) working with youth • Facilitate intermediary organisations' access to specialised discounted offers	

5.4   Families

5.4.1 Features of the target group and market size

The target group "families" covers multiple types of families (children, parents and/or grandparents) certified by their country's coordinating authority as facing difficult social, (financial, personal and/or disability) circumstances.

The definitions of the families facing difficult social circumstances differ greatly from one participating country to another. The target group consists of several types of families, such as:

- Families with a low income (including families with an unemployed parent)
- Families supported by a single parent
- Families with more than two children
- Families with a child/parent with a disability
- Families facing social difficulties (for example alcoholism, drug addiction, abuse, health problems)
- Families taking care of older family members (for example grandparents)

Moreover, the definitions of low income differ from one participating country to another.

Due to the difficulty in setting one single definition for families facing difficult social circumstances, many participating countries are unable to assess how many such families there are in the country. It is however known that in 2008, 17% of the EU population was assessed to be at-risk-of-poverty when following the concept of relative poverty adopted in the EU. In relation to the target group of families, statistics show that 20% of children were at-risk-of poverty in the EU, with the highest figures found in Romania, Bulgaria, Italy and Latvia. Children were thus in greater risk of poverty than the rest of the population in the EU. According to the EU-SILC (Statistics on Income and Living Conditions), the main factors of child poverty are the labour market situation of the parents, as well as the effectiveness of government intervention through income support and the provision of enabling services such as childcare. Single parents are a case in point, as their at-risk-of-poverty rate in 2008 was 35%.[30]

In the table below, the definition of the target group "families facing difficult social circumstances" in each participating country is presented, together with the variances between definitions of low-income families with children when applicable. Furthermore, the assessment of the number of families belonging to the target group is given for those countries where this has been possible.

Table 9: Definition of the target group "families facing difficult social circumstances"[31]

Country	Definition of the target group	Number of families
Austria	No common definition exists. Definition depends on the support programme.	1.2 million families with a child under 15. 50% of the single parent families are considered to be under poverty level.
Belgium	Low income families include single parents, new migrants, unemployed parents and people with a poor health condition. Poverty level (based on monthly income)* Single: €878 2 family members older than 14: €1,317 2 family members older than 14 + 1 child: €1,581 2 family members older than 14 + 2 children: €1,844 2 family members older than 14 + 3 children: €2,108	50% of the single parent families in Flanders cannot afford a one-week holiday. 67% of the families with unemployed parents cannot afford a one-week holiday.

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[30] Eurostat: 17 % of EU citizens were at-risk-of-poverty in 2008. Statistics in focus 9/2010. Population and social conditions.

[31] If no specific source is mentioned, please refer to the Calypso country report of the country in question.

	1 family member older than 14 + 1 child: €1,142 1 family member older than 14 + 2 children: €1,405 *Calculation:* *For every additional family member over 14 years old: + €439 (half of the monthly threshold for singles)* *For every additional child (under 14): + €263 (30% of the monthly threshold for singles)*	
Bulgaria	Families facing difficult social circumstances are divided into two groups: 1) Families with financial problems are defined as "socially disadvantaged families". The monthly income of a member of such family is defined by law at approximately €22 or less. 2) Families with a member with health problems.	No statistics available.
Croatia	Families that have an annual income of less than 51,054 HRK (app. €7,000).	25,000 families (belong to the social care programme of the Ministry of Health and Social Care)
Cyprus	A supplementary child benefit support is provided to families with an annual income below €20,460.	Statistics of families facing difficult social circumstances are not available. There is a total of 24,000 families in Cyprus.
Czech Republic	No common definition exists. A research study has defined a "living minimum", which is a monthly income of €900 for a family with two adults and two children.	No statistics available Researchers estimate that the share of families living under the "living minimum" should not exceed 9% of the total number of families.
France	The definition differs from one territory (region) to another.	6.7 million families have access to family benefits 1.7 million families are single-parent (with children under 25 years)
Greece	The poverty threshold for a family with two dependent children has been set at an annual income of €11,864.54.	No statistics available.
Hungary	Income per capita is lower than the level of subsistence (42,869 HUF/month, app. €170/month).	No statistics available.
Latvia	Families facing difficult social circumstances are known as "social risk families"	No statistics available. In Riga, 1% (3063) of all families are categorised as social risk families.
Ireland	Specific income levels are set to define who receives Family Income Supplement. The income limits are: 1 child: €506 2 children: €602 3 children €703 4 children: €824[32]	Family Income Supplement was paid to 27,798 families in 2008.
Italy	Specific income levels are set to define who is entitled to Holiday Vouchers. The level is based on the net income of a family unit and depends on the number of persons in the family.	No statistics available. 17% of families find it difficult to stretch their income to the end of the month.
Lithuania	The group is divided into several types of families: Families at social risk (families with low income, one or both of the parents have alcohol or drug problems); Families with more than three children; Children growing in families at risk;	In 2008: Families at social risk (families with low income, one or both of the parents have alcohol or drug problems: 11,350 Families with more than three

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[32] http://www.citizensinformation.ie/categories/social-welfare/social-welfare-payments/social-welfare-payments-to-families-and-children/family_income_supplement.

	Children under guardianship in families	children: 42,000 Children growing in families at risk: 25,480 Children under guardianship in families: 7,240
Malta	There are no clear statistics or descriptions of families that are facing difficult circumstances.	No statistics available. There were 45,188 families receiving child allowance, 708 families receiving disabled child allowance and 2,687 families receiving family benefits in 2008.
Poland	No common definition exists.	App. 60% of large families live under the poverty level. In families with at least one person with disability, 19% live under the poverty level.
Portugal	There is no official legal definition of "low-income family" in Portugal. The INATEL Foundation has established a scale for this type of family in order to allow them to take part in the social tourism programme that is carried out. These scales are based on fiscal criteria, depending on gross monthly income, and vary from below or equal to €237.50 to a maximum of €950.	No statistics available.
Romania	Families that have no income Single parent families	Families that have no income: 569,838 Single parent families: 194,294
Slovakia	Households with children that receive social assistance benefits for material needs Single parent households Large families	In the first half of 2006: Households with children that receive social assistance benefits for material needs: more than 63,000. Of these: Single parent households: 22,438. Large families: 10,000
Slovenia	Low revenue is defined as a family where both parents are receiving minimum wage (€597,43).	25% of families.
Spain	No legal definition exists in Spain. Low income criteria are use to access certain social benefits. Certain private studies from social organisations define "low income" situations as those where the availability of economic income is potentially insufficient to face necessary expenses to maintain minimum levels of welfare, besides the mere coverage of basic needs. The thresholds are calculated at 60% of average net income.	No statistics available.
Turkey	Poverty level for a family with four members is 767 TRY (€364).	No statistics available.

When looking at the question of defining the target group "families facing difficult circumstances" from a European perspective, it can be seen that the main definition used in particular by the European Commission concerns the at-risk-of-poverty threshold of European families. Eurostat provides information on the at-risk-of-poverty threshold for families consisting of two adults with two children younger than 14 years.[33] Moreover, it is possible to identify the at-risk-of-poverty rate for families consisting of two adults with two dependent children. These poverty thresholds and rates were the following in 2008[34]:

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[33] This at-risk-of-poverty threshold is calculated as being 60% of the median national equivalised income in PPS.
[34] Source: Eurostat, At-risk-of-poverty threshold.

Table 10: At-risk-of-poverty thresholds and rates[35]

Year 2008		
Country	At-risk-of-poverty threshold (€)	At-risk-of-poverty rate (%) for two adults with two dependent children
Austria	23,953	11
Belgium	22,654	8
Bulgaria	2,736	15
Croatia	5,126[36]	10[37]
Cyprus	21,046	10
Czech Republic	7,640	7
France	22,130	9
Greece	13,608	22
Hungary	5,542	16
Ireland	28,896	12
Italy	19,702	22
Latvia	6,088	21
Lithuania	5,253	13
Malta	12,029	20
Poland	5,235	18
Portugal	10,243	21
Romania	2,462	24
Slovakia	6,038	10
Slovenia	13,724	8
Spain	16,282	22
Turkey[38]	2,144	16

5.4.2 Main findings in the participating countries

Seasonality and main barriers

When looking at the table below, it is clear that families facing difficult social circumstances have, despite the heterogeneity of the definitions in each participating country, several characteristics in common when it comes to their travel habits. In almost all participating countries, these families only travel inside their own country, as they cannot afford to travel abroad. Financial constraints are the main barrier for travelling, and the families are to a very large extent only able to travel during high-season when children have holiday from schools.

Table 11: Seasonality and main barriers

Country	Main destinations abroad	Seasonality	Main barriers
Austria	Differ from one family to another.	Not possible to travel off-season. However, children's ski weeks take place "in-between" seasons.	Financial constraints Need for family friendly accommodation
Belgium	Not known	Not possible to travel off-season	Financial constraints.
Bulgaria	Mainly domestic tourism. Easily reachable by public transportation and low costs. Prophylactic and rehabilitation centres.	Possible to travel off-season.	Financial constraints.

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[35] All data from Eurostat: At-risk-of-poverty threshold.

[36] Data from 2003.

[37] Data from 2007.

[38] All data from 2003.

Croatia	Mainly domestic tourism.	Not known.	Financial constraints. Only a small number of supported holidays available, i.e., not everyone has the possibility to participate.
Cyprus	Mainly domestic tourism.	Not possible to travel off-season.	Financial constraints
Czech Republic	Mainly domestic tourism.	Not possible to travel off-season.	Financial constraints.
France	Mainly domestic tourism – seaside and countryside.	Not possible to travel off-season.	Financial constraints
Greece	Not known	Not known	Financial constraints.
Hungary	Not known	Not known	Not known
Ireland	Not known.	Not known	Not known
Italy	Mainly domestic tourism.	Not possible to travel off-season.	Financial constraints together with the lack of appropriate welfare policies.
Latvia	Mainly domestic tourism.	Not possible to travel off-season.	Financial constraints.
Lithuania	Not known	Not known	Financial constraints. Negative attitudes towards families at social risk > participation on holiday could lead to additional negative attitudes.
Malta	Not known.	Not possible to travel off-season.	Financial constraints. 82.3% of families with three or more children cannot afford to pay one week annual holiday away from home.
Poland	Mainly domestic tourism.	Not possible to travel off-season.	Financial constraints.
Portugal	Mainly domestic tourism.	Not possible to travel off-season.	Not known.
Romania	Mainly domestic tourism.	Not possible to travel off-season.	Financial constraints. Difficult to leave work within subsistence agriculture and small cattle farming. Lack of information. Lack of transport subsidies.
Slovakia	Mainly domestic tourism. When going abroad, the destinations are easily reachable by car, i.e., Croatia, Slovenia or Italy.	Not possible to travel off-season.	Financial constraints.
Slovenia	Mainly domestic tourism.	On-season preferred, off-season also possible.	Financial constraints.
Spain	Not known.	Not known.	Not known.
Turkey	Mainly domestic tourism.	Not possible to travel off-season.	Financial constraints.

With respect to the seasonality aspect of families with children at school, school holidays provide an appropriate marker for defining the acceptability to go on holiday off-season.

The table below indicates the main school holidays (primary education) in the participating countries in 2010 and 2011.[39] The school holidays may also differ between different municipalities, regions and different age groups. In case the holidays stagger (differ in period)

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[39] In order to enable a graphic presentation based on calendar weeks, calendar years are used as the basis of the illustration. The information is based on data collected by the Eurydice network of EACEA and presented in the following two documents: EACEA: Organisation of school time in Europe – Primary and general secondary education, 2009/10 school year; and EACEA: Organisation of school time in Europe – Primary and general secondary education, 2010/11 school year. For a number of countries that EACEA report does not include data for school year 2010/11. However, in order to ensure full comparability of the data, no additional sources have been used to fill in the gaps in the data. Week 52 has been marked as a holiday week in all other countries but Turkey even though exact data was not included in the EACEA reports.

between regions, municipalities or ages, one example has been chosen and followed throughout the data. The different holiday periods are indicated using the following markings:

Summer holiday
Autumn holiday
Christmas/New Year
Winter/Carnival
Spring/Easter
Information not available

Table 12: School holidays in the participating countries

Month (2010)	January				February				March					April				May				June				July				August				September				October				November				December			
Week	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52
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As can be seen from the above illustration, there are only 14 weeks in a year where there are no holidays in any of the participating countries. Most of them are found from the second part of the year, and in particular in October (weeks 39-42) and November/December (weeks 47-50).

For most participating countries, statistics concerning **the holiday participation of families facing difficult social circumstances** are not available. This is mainly caused by the lack of definition of the target group. The only countries offering any figures concerning holidays of these families are Cyprus, Czech Republic, France and Poland. Whereas the figures in Cyprus concern holidays supported by the Ministry of Labour and Social Insurance Programme (336 families in 2009), in Czech Republic the figure is an assessment of researchers working in the field (10% of families facing difficult social circumstances can go on holiday). The most reliable statistics are available from France, where 50% of large families (at least five children) and 42% of single-parent families go on holidays (compared to the national average of 52% of all families). In Poland, 39% of the poorest family households declared tourism activities in 2005.

What these families also have in common is their **sensitivity to the price** of a holiday. In all countries where data could be found, the respondents and statistics declare that families facing difficult social circumstances are highly sensitive to the price of a holiday. In some countries, it was specified that this was particularly the case for single parent families and large families, and in other countries the respondents and statistics state that the families only go on holiday if it is completely free of charge or only entails a symbolic price.

Stakeholders
On the European level, family policies are still a responsibility of the Member States. This is also why the main stakeholders in the field of families face difficult social circumstances in the Member States. However, there are some stakeholders on the European level dealing with family policies, and even though they are mostly not involved in promoting or supporting family holidays, they are important to take into consideration when developing support systems for European families.

European Alliance for Families
The European Alliance for Families, established by the Heads of State and Government of the EU in 2007, aims to support key players in the Member States in their efforts to create better living conditions for European families. The main tool of the European Alliance is its web portal, which consists of information, good practices, reports and studies in the field of family policy, including reports on poverty, well-being and social inclusion. All of these are themes that are, despite the fact they do not directly discuss holidays, indirectly related to the Calypso preparatory action.[40]

Confederation of Family Organisations in the European Union (COFACE)
The Confederation of Family Organisations in the EU aims to promote family policy, solidarity between generations and the interests of children within the EU. It has more than 50 member organisations in Member States. COFACE actively participates in the development of European policies in the fields of e.g. social inclusion, equality, parental leaves and work life balance through consultations.

The main stakeholders in the participating countries are presented in the table below, together with their areas of responsibility.

Table 13: National level stakeholders in the field of social tourism directed at families

Country	Stakeholder	Type of stakeholder	Responsibility
Austria	Federal level: The Federal Ministry of Economy, Family and Youth	Public	Among others, to pay out child allowance.
	Each state has its own ministry responsible for family affairs	Public	For example, family policy on the state level, day care, educational social work

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[40] European Alliance for Families: http://ec.europa.eu/employment_social/emplweb/families/index.cfm?langId=en&id=1.

	Familienbund	NGO	A non-political, non-confessional interest organisation representing families on federal, regional and local levels.
Belgium	Flanders: Flemish Ministry of Welfare, Public Health and Family	Public	Aligns itself with the requirements and requests of socially vulnerable families, support on raising children, provision of day care
	Wallonia: Ministry of the Walloon region, Directorate General for Social Action and Health, family department	Public	Responsible for the financial support attached to family policies in the Walloon region
Bulgaria	Ministry of Labour and Social Policy	Public	Develops policies in order to support individual persons and families with social difficulties.
Croatia	Ministry of Health and Social Care	Public	Not known
Cyprus	Ministry of Labour and Social Welfare Services	Public	Responsible for the welfare system
	Ministry of Finance	Public	Child benefits and mother's allowance
	Pan-cyprian organisation of large families	NGO	Not known
Czech Republic	Ministry of Labour and Social Affairs	Public	Responsible for the social benefits
France	Ministry of Social Affairs; Family Credit Offices Department	Public	Social support for families, child allowances etc.
	Vacances Ouvertes	Association	Support to projects helping families go on holidays
Greece	Ministry of Health and Social Security	Public	Not known
	Confederation of large families	NGO	Not known
Hungary	Ministry of Local Government and Ministry of Social Affairs	Public	Responsible for social services
	National Association of Large Families	NGO	Aims to organise large families into a fellowship that can help its members. Offers preferential holiday services.
Ireland	Department of Health and Children	Public	Responsible, among others, for the child allowance.
	Department of Social and Family Affairs	Public	Responsible for social support, provides social assistance, among others, to single parents.
Italy	CRAL (Workers' Recreational Clubs)	Private	Promotes and implements activities aimed at promoting free time and the social and cultural spheres among its members.
Latvia	Ministry of Welfare	Public	Responsible for the national family policy and legislation
	Creative Association "Trepes" (Stairs)	NGO	Organises tourism trips for children from families facing difficult social circumstances.
Lithuania	Ministry of Social Security and Labour, Family Welfare Division	Public	Responsibility for family policies, social security and allowances
	National Family and Parents Association	NGO	Represents the interests of families, provides counselling and information.
Malta	Ministry for Social Policy, Social Security Division	Public	Responsible, for example, for child allowances, family therapy and social assistance
Poland	Not known	Not known	Not known
Portugal	INATEL Foundation	Public	Support through the "Solidarity Tourism" programme.
Romania	Ministry of Labour, Family and Social Affairs	Public	Responsible for social support and family policies.

Slovakia	Ministry of Labour, Social Affairs and Family	Public	Limited. Social support only given at the birth of a child.
	Club of large families in Slovakia	NGO	Organises exchanges with families of Slovak origin from Germany and Hungary.
Slovenia	Ministry of Labour, Family and Social Affairs, Family Affairs Directorate	Public	Responsible for family allowances
	Slovenian association of friends of youth	NGO	Not known
Spain	Regional authorities, such as the Catalonian administration and Region of Galicia	Public	Organise leisure activities for low-income families.
Turkey	Board of Social Services and Protection of Children	Public	Not known
	Directorate General for the Status of Women	Public	Not known
	The Family Council	Public	Organises a family school programme and in kind support projects (food, clothing, furniture)

Supply

Whereas the supply of tourism services directed at families in general is very broad, the services directed at families facing difficult social circumstances are scarcer. Such services are offered in several participating countries. In most cases, the services are directed at families of a specific municipality or region, and only a small number of services include an exchange mechanism or holiday abroad. The table below presents some examples of supply of social tourism services directed at families facing difficult social circumstances, or including exchange mechanisms.

Table 14: Examples of supply of social tourism services directed at families

Country	Name	Type of stakeholder	Needs taken into account	Transferability to Calypso level
Austria and Czech Republic	Family Card Niederösterreich-Vysocina	Public	Takes into account the price sensitivity of families, providing discounts for tourism services and products.	A discount card for tourism services directed at families would be relatively easy to apply on European level. Administrative support is needed in order to quality assure the offers.
Portugal and Greece	TYPET bilateral exchange programme	Private	The programme is directed at the different types of participants.	Transferability is limited, in particular because the participants are in most cases not low-income families.
Belgium, France and the UK	The European Holiday Experience	Public and private	The financial constraints and lack of experience from travelling are taken into account.	The action is very small in nature and it would need a lot of developing in order to introduce it on the Calypso level. Financial support is provided by the stakeholders and equivalent support would be needed from each Member State.
Latvia	Holidays for Latvian low-income families to Czech Republic, Slovakia and Hungary	Private	• The proposed itinerary was tailored to the interests of both children and their parents; • The trip was planned a bit shorter than usual to make it cheaper and bearable for children; • The price for the	Private initiatives play an important role in stimulating social tourism and therefore need to be encouraged. This one provides a good example of the supply matching the demand. While it is not an exchange, international tour operators could initiate similar activities on a larger scale. It would require initiative of the tour operators and strong motivation for organising

			trip was made equal to its actual costs, thus making it affordable for low-income families.	tours without any profit. In principle, this margin can be subsidised by other public – state, municipal or EU funding, although it might be a subject of the conflict of interest.
Croatia	Holidays of low income families and singles	Private	The financial constraints are taken into account – the participants only pay a symbolic fee for their participation.	Not directly transferable at the Calypso level.
UK	Family Holiday Association	Private	The financial constraints (financial support provided), lack of experience from travelling (support in booking a holiday), family friendly destinations, specific support for families facing domestic violence etc.	The activities of the association mainly take place within the domestic tourism sector because international travel is challenging, for example due to price and need to acquire a passport.

5.4.3   Possible Calypso actions for families facing difficult social circumstances

As can be seen above, the main constraint for families facing difficult circumstances in all participating countries was, despite the definition of the target group, financial. This is why the table below is based on the presumption that all different types of families have the lack of funding as their main barrier. Thus, families have been divided into different segments according to characteristics other than low income.

Target segments	Main features & barriers of going on holiday	Needs in order to increase travel practices	Possible Calypso actions	Possible Calypso mechanisms
Families supported by a single parent	• Costs of the holiday are very high, even for single parents with a relatively high income. • Easier to go on holiday with several adults, i.e., with grandparents or in a group.	• Financial support and information on existing supports • Services directed at single parent families (i.e. group holidays, holiday centres with activities for children and adults) • Discounts (cards)	• Facilitate access to information on existing supply • Facilitate intermediary organisations' access to specialised discounted offers	• Calypso platform directed at the needs of the five family segments with general public access • Calypso platform with limited access for intermediary organisations
Families with more than two children	• Costs of the holiday get very high with several family members travelling simultaneously	• Financial support and information on existing supports • Accommodation for large families (i.e., rooms attached to each other)	• Facilitate access to information on existing supply • Facilitate intermediary organisations' access to specialised discounted offers	
Families with a child/parent with a disability	• Specific needs in terms of accessibility • For families where a family member has a mental disability, holidays in an unknown place can be more stressful than life at home	• Financial support and information on existing supports • Information on accessibility gathered in one well-known location • Clear descriptions of the location in order to make planning possible	• Facilitate access to information on existing supply • Organise the information on accessibility to destinations and tourism facilities, and facilitate access to this information • Facilitate intermediary organisations' access to	

			• specialised discounted offers	
Families facing social difficulties (such as alcoholism, drug use, domestic violence, unemployment)	• Lack of information and experience, fear of the unknown • Difficulties planning a holiday well in advance	• Financial support and information on existing supports • Support for booking holidays • Possibility to pay for a holiday in partial payments • Destinations where both parents and children have activities close to each other	• Support the intermediary organisations (public national/regional/local authorities, not-for-profit associations, social workers, etc.) working families facing social difficulties • Facilitate intermediary organisations' access to specialised discounted offers • Facilitate access to information on existing supply	
Families taking care of an older family member	• Need to find someone to take care of the family member while others are on holiday	• Financial support and information on existing supports	• Facilitate access to information on existing supply • Facilitate intermediary organisations' access to specialised discounted offers	

5.5 Main findings on supply for all target groups

All participating countries are traditional tourism destinations or have been implementing tourism development plans, and thus consider the tourism sector as a strategic driver for their economy. They have developed tourism infrastructure for both domestic and inbound tourism. Their mainstream supply in terms of transportation, accommodation and catering is globally good quality, and standards become closer and closer to the European level, allowing each country to receive Calypso targets. Nevertheless, very new European entrants still have an old tourism infrastructure facing lack of investment and modest public infrastructures (transport, roads, services, etc.). This creates, for the time-being, a gap with Western countries standards.

The accommodation capacity of beds varies strongly from one country to another (France, Italy and Spain have the largest capacities) according to the structure of the accommodation sector. Some countries have focused their tourist bed capacity on hotels, and others have diversified their model with other collective accommodations like campsites, collective dormitories, etc

Table 15: Tourism infrastructures

	Hotels and similar establishments	Other collective accommodation establishments	Total
Austria	572,514	362,157	934,671
Belgium	123,775	244,091	367,866
Bulgaria	211,565	35,451	247,016
Croatia	163,168	318,751	481,919
Cyprus	89,490	4,231	93,721
Czech Rep	236,104	205,864	441,968
France	1,253,962	4,483,004	5,736,966
Greece	693,252	93,639	786,891
Hungary	158,762	156,522	315,284
Italy	2,086,942	2,412,729	4,499,671
Ireland	148,077	60,401	208,478
Latvia	19,650	4,839	24,489
Lithuania	21,504	10,367	31,871
Malta	39,518	684	40,202
Poland	178,056	396,556	574,612
Portugal	264,037	191,106	455,143
Romania	226,383	60,775	287,158
Slovakia	57,985	86,616	144,601
Slovenia	31,145	35,038	66,183
Spain	1,614,545	1,460,288	3,074,833
Turkey*	322,334		322,334
*in 2000			

Another type of product is found in almost all countries: thermal spas, health resorts, and sanatorium. These infrastructures are usually already good tourist attractions, open year-round and well-equipped, especially for seniors and people with disabilities.

"Social tourism'' and social tourism supply have different meanings depending on the country:
- In some countries, there is a strong tradition to support social tourism in the same field of the demand as in the field of the supply (i.e. France and Belgium). For example, in the past France has developed dedicated supply for specific targets (especially accommodation).
- Spain also has a strong heritage of social tourism but is more focused on supporting target groups (especially seniors) without dedicated supply.
- In some countries, the term 'social tourism' is not even used (e.g. Austria), and in others it may have a negative connotation (e.g. Poland).
- The majority of participating countries are not much or not at all familiar with social tourism. In this sense, in most of the participating countries, public social welfare supports citizens facing social and economic circumstances go on holidays inside the

country, but few countries have developed dedicated supply. The few existing structures are accommodation and are mainly owned and operated by unions.

These differences in the conceptual approach of social tourism involve a strong heterogeneity on dedicated supply that can hardly be a basis for exchange mechanisms.

Moreover, the trend nowadays is to develop a "non specialised offer" instead of a "social tourism offer". Indeed, the countries offering a dedicated social supply have been conducting market studies on social targets. These surveys have shown that all tourists, whatever their level of income or accessibility constraints, have the same motivations and needs when going on holiday. Therefore, these countries have concluded that social tourism policy should consist of giving to people who cannot go on holiday the same kind of holiday as the ones who can pay, without any kind of segregation. Consequently, the development of specific products for social tourism should not consist of specialising tourism facilities and accommodation, but more in helping and accompanying people not used to travelling, such as with preparation, help for travel, welcome on site, etc.

In addition, dedicated social supply is normally barely profitable when not open to mainstream clientele. The necessity of very low cost packages cannot permit a good profitability, necessary condition for good employment conditions and reinvestment capacity to keep the infrastructure on the market standards. Currently, the existing dedicated "social tourism" offers are progressively open to all clients (i.e. in France) or are not-for-profit structures supported by Government financial helps (i.e. trade unions centres). This point raises the problem of public financial capacity/resources to support such actions, especially in the current economic situation.

Therefore, the trend will be to develop Calypso tourism with non-specialised supply, i.e. mainstream tourism supply:
- in countries where social tourism is traditionally a field of public intervention with a supply specifically designed for social tourism, as well as with many unspecialised tourism facilities involved in social tourism, but with a major concern nowadays to give to people who cannot go on holiday the same kind of holiday as the ones who can pay through a 'non-specialised offer';
- or, in countries where social tourism is a new field mainly focused on inbound tourism and where social tourism is considered a marginalised and diffuse sector.

A definition of Calypso supply would be that it potentially concerns all tourism products and service providers on the condition that they can offer availability during off-season, as well as on the condition that they can bring suitable offers to Calypso target groups, particularly in terms of accessibility for citizens with disabilities. This will only be sustainable in a scheme providing minimum profitability to the private sector.

In many participating countries, especially those in the Mediterranean (more than 80% of the clientele concentrated on 2 or 3 months), mainstream supply suffers from seasonality. Across the studied countries, suppliers are all open according to certain conditions to receiving more clients during the off-season and to offering discounts without any consideration of their social or economic status.

In the majority of European countries, there is already a yield management practice on prices that Calypso targets could benefit by, with some important national off-season and early booking offers launched by professionals and relayed by public promotion organisations.

In all participating countries, the main challenge is in terms of accessibility for people with disabilities, such as accessibility of the destination as a whole and access to the accurate information on the accessibility conditions of the facilities. Even if existing laws in all countries find public infrastructure and transport to be accessible, the room of improvement is still large. Regarding accommodation, legislation usually integrates the mention of the percentage of rooms adapted to people with disabilities. Nevertheless, most of the tourism infrastructures in Europe remain non-accessible for people with disabilities, and only three of the participating countries (France, Belgium and Czech Republic) have implemented a specific label. If recent tourism

infrastructures are usually now adapted for disability, the necessary adaptation of old infrastructure involves very important investments for private operators.

5.6   Analysis of legal issues pertaining to social tourism

Our study tackles the relationship or potential impact that legislation may have on the development of social tourism. **The approach intended has not been to undertake a juridical analysis, but to identify the conditioning factors and, hence, the potential or real obstacles in national and European legislation that may limit dynamics in this sector.** Thus, the mapping carried out includes all types of relations, direct and indirect, between national legislation at any level (State, regional, local) and in any sphere (administrative, tax, etc) considering that European legislation must be implemented directly (Regulations) or transposed (Directives) in the Member States.

A choice has been made to identify restrictions that could condition current or future social tourism activity, as in the opposite case very few Member States have legislation specifically promoting social tourism. As shown in other chapters in this report, certain countries (France, Italy, Spain, Portugal, Hungary, etc.) have introduced or already implement policies favouring social tourism, which entails the development of regulations, generally administrative or tax-related.

From the analysis carried out in the 21 countries which are the object of this study, no statement can be made regarding a special impact of legislation on tourism activity.

Several cases reported more direct relationships, especially with regards to facilitating accessibility in tourism buildings and residences, which have a direct impact on costs and the investments needed. Other cases point out tax issues that influence the services offered (tickets). Finally, general legal aspects have been identified that may have an indirect impact on the development of social tourism activities. The influence of legislation on social tourism in the following types may be classified as the following:

- Technical: regulation on tourist installations of any kind regarding accessibility of disabled persons.
- Administrative: norms affecting the regulation of several services basically derived from the transposition into national legislation of Directive 2006/123/EC on Services in the internal market. It affects the transnational activity of travel agencies, consulting services and other administrative regulations that until now were exclusively national, such as the establishment of hotels or the requirements to function as tourist accommodation or restaurants.
- Competition: State aids, inasmuch as they can distort competition in the single market, are regulated by European legislation which must be complied with. Besides this general legal link, no direct relationship can be mentioned between State aids and the tourism sector, including social tourism.
- Tax: regulation of taxes and tax exemptions which affect: i) tourism activity overall (the type of VAT, which has increased in some countries as a result of the need to increase income to face public deficit), including some typical tourist destinations in the Mediterranean such as Greece and Italy; ii) the offering of tourism services through payment in kind, especially holiday tickets.
- Labour: the way in which labour legislation or collective agreements establish the period in which holidays may be taken (only during the summer months or distributed throughout the year or even in multi-annual periods) may condition the choice of social tourism for the family or young workers target groups. The legal obligations regarding the holidays of unemployed persons add a new variable to the social and labour aspects of the low-income family target in that legislation in some countries oblige persons with unemployment benefits to be permanently available to carry out activities favouring their labour integration through active labour market policies. On the other hand, some Member States (for example Ireland) have introduced "universal access to holidays", through which the unemployed are also entitled to paid leave.
- Social: level of development of social protection and pension policies in the different Member States which allow vulnerable groups to generate income (disabled persons, retired

pensioners, low-income families) to directly or indirectly finance social tourism activities (through co-payment or subsidy, as in the case of most countries that implement social tourism programmes).

5.6.1 The possible impact of the Directive on Services in the development of social tourism

The Directive on Services[41] will be enforced in 2010 and will entail the free circulation of services in the EU. Its transposition into legislation in the Member States –on 28 December 2009 at the latest- establishes a reform that may have immediate effects on the tourism activity in general and, as a result, could have indirect effects on the development of social tourism. The following tourism-related activities will certainly be affected by this legal and administrative reform:

- Travel agencies;
- Tourist guides;
- Tourism operators;
- Tourism establishments;
- Car rental;
- Conference organisers;
- Amusement parks.

Transport services are not included in the scope of implementation of the Directive. The effects of this legislation implemented through national reforms, in the sphere of social tourism, could be summarised as follows:

1. Facilitating the freedom to establish and offer tourism services in the domestic market. That is, the elimination of any legal or administrative obstacles for any institution offering services (travel agents) makes it easier to access the activity in a Member State. The Member State can only impose a respect for requirements that are non-discriminatory, proportionate and justified as regards public order, public safety, public health or environmental protection.

2. Simplification of procedures and the implementation of a single electronic office through which any institution offering services from any Member State can carry out all necessary procedures to carry out its activity.

3. Protection of the **rights of consumers** and users of the services.

Whereas the impact assessment on the Services Directive[42] does not aim to specify the impacts of the Directive per service sector, the Directive is expected to have a positive impact on the possibilities of the SME sector to gain a more steady hold of the tourism market. Cross-border networks are expected to enable the SMEs to overcome particular problems, for example in terms of posting of workers in another Member State. This is very relevant for the tourism sector, where the number of SMEs is high, but a number of giant tour operators hold the majority of the global market.[43]

From a regulation point of view , national legislation on tourism has been reformed, as well as administrative norms at regional or local level regarding this activity, for instance in Spain. This means an operator established in another Member State may offer services in the territory by amending or eliminating unjustified or disproportionate legal requirements related to authorisation schemes and requirements regarding business establishment.

Travel agents seem to be the sector most affected by enforcement of the Directive. Complaints exist in some countries regarding what is considered encroachment or unfair competition, since any travel agency might now develop services in any Member State. This, however, is not the only sector affected. Some of the effects of the transposition are detailed below:

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[41] Directive 2006/123/EC of 12 December 2006 on services in the internal market.

[42] Commission Staff Working Paper: Extended impact assessment of proposal for a Directive on Services in the Internal Market. SEC(2004)21, 13.1.2004.

[43] Ibid, p. 12.

Activity affected	Some of the legal aspects to review in national legislation
Establishment of travel agencies	*Are there any reasons of general interest (protection of consumers) to condition the authorisation?* Operators may be required insurance or guarantees in the case of financial security risk of the addressee. Implementation of an equivalence scheme? Is an equivalent certificate issued in another Member State accepted?
Tourism guides	i) Accompanying guides: full implementation of the freedom to offer services ii) Qualified guides: if this profession is regulated in a Member State because it requires specific knowledge, is there need for authorisation (establishing degree validation/recognition)? It may fall within the defence of general interest as an *objective of cultural policy and the preservation of historic and artistic heritage.*
Establishments: hotels, restaurants etc.	Adaptation of all administrative regulations: requirements for the different categories in tourism accommodation (minimum number of beds, services, etc). In some cases, specific requirements could be imposed, including prior authorisation for reasons such as environmental protection. (The Directive does not apply to territorial, urban and rural planning policy requirements).

5.6.2 The Package Travel Directive[44]

For most target groups covered by Calypso (with the exception of young independent travellers), package travel is an interesting option in which to travel. For people not experienced with travelling, the most realistic option for a trip is to purchase a package, including both travel and accommodation. The Package Travel Directive has aimed at protecting consumers in the area of package travel since 1990. The Directive covers pre-arranged holiday packages including at least two of the following:

- Transport;
- accommodation ;
- other tourist services not ancillary to transport or accommodation and accounting for a significant proportion of the package.[45]

Consumers are covered where: (a) at least two of the above elements are sold at an inclusive price and (b) the service covers more than 24 hours or includes an overnight stay.

The Package Travel Directive specifies the roles of the different actors in relation to package travel:

- 'organiser' means the person who, other than occasionally, organises packages and sells or offers them for sale, whether directly or through a retailer;
- 'retailer' means the person who sells or offers for sale the package put together by the organiser;
- 'consumer' means the person who takes or agrees to take the package ('the principal contractor'), or any person on whose behalf the principal contractor agrees to purchase the package ('the other beneficiaries'), or any person to whom the principal contractor or any of the other beneficiaries transfers the package ('the transferee').

In the case of Calypso, it is in this respect important to define the role of the intermediary organisations. The question is whether the intermediary organisations can be understood as both "organisers" and as "consumers", and what their role then is towards the retailers, i.e. the service providers. It also must be considered whether the intermediary organisations are thought of as "the principal contractors", and thus clients entitled to the rights entrusted by the Directive

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[44] Council Directive 90/314/EEC of 13 June 1990 on package travel, package holidays and package tours.

[45] Directive 90/314/EEC, Art. 2.

towards the retailers, or whether they are organisers with a liability towards the end-client, i.e. representatives of a target group. The Directive defines all these actors as "persons". However, what is understood by a person remains unclear, and it is thus not clear whether an organiser has to be an economic operator or whether the only requirement is that the actor be a legal person. This distinction is relevant in relation to Calypso, where several intermediary organisations are NGOs or associations. In this case, it would be reasonable to interpret the intermediary organisations to be consumers, i.e. principal contractors, as they would most likely be the ones purchasing a product from an organiser or retailer. The Directive covers products sold or offered for sale, and depending on the relationship between the intermediary and the final consumer would be that of a principal contractor and transferee.

5.6.3 Social security and health

The scoping exercise conducted in the participating countries revealed only minor direct issues of national social security legislation impinging on Calypso exchanges. These include:

- In Bulgaria, the Regulation for Implementation of the Law on Social Support limits the possibilities of people receiving public financial support from travelling abroad.

- In Romania, foreign tourists have the right to purchase the two spa season offers of 'a spa decade' and 'a week of recovery in a spa', but they will have to pay separately the two treatments included in the package. The treatments are only partially reimbursed to the spa hotel owner by the social national insurance fund if the customer is a Romanian citizen. It is the duty of the foreign citizen, and more particularly of the E.U citizen, to try to be paid back by his country's own social insurance fund. Considering the very low price of spa treatments in Romania, foreigners generally do not consider this issue as a hindrance and few tried to be reimbursed once back in their countries.

An interesting aspect of social tourism related to social security and health is related to the special needs arising from two target groups in particular: the seniors and people with disabilities. For both of these groups, the possibility to participate in tourism activities is often dependent on the availability of suitable health care at the destination. Suitable healthcare can be characterised as care not only responding to the medical needs of the person, but also taking into account the need to receive services in a language understandable to the traveller.

One practical example of social tourism where such a need has been taken into account is the holiday packages organised by the Austrian tour operator specialised in providing holidays for seniors: SeniorenReisen Austria. All of the holidays organised by SeniorenReisen Austria must fulfil specific criteria, including the availability of Austrian nurses and doctors to the travellers, as well as a full insurance package ensuring medical care at the destination and a flight back to Austria if considered necessary.

In particular, the question of having Austrian nurses and doctors available, as well as having insurance which ensures medical care, brings about considerations related to European legislation, especially in the fields of social security and cross-border health care, but also in relation to the Services Directive.

The European Court of Justice has stated several times in its case law that the freedom to provide and receive services includes the right of patients to receive non-hospital care (including dental care, specialist advice or ambulant medical treatment for example) in another Member State and to be reimbursed by their own health security system without having to obtain prior authorisation for the reimbursement. The case law is also supported to some extent by the Services Directive which, even though it does not create any new rights to the patients, clarifies the differences between hospital and non-hospital care.[46]

EU legislation also exists in the field of social security, and more specifically in relation to the coordination of social security systems. Regulation 1408/71 deals with many aspects of reimbursement for medical treatment obtained in another Member State. The Regulation provides that "patients who have been granted an authorisation by their national social security system can access medical treatment and in particular hospital care in another Member State

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[46] http://ec.europa.eu/internal_market/services/services-dir/faq/200410-faq-point10_en.htm.

under the same terms and conditions as nationals of that Member State and that the costs will be assumed by their own national social security system according to the tariffs and level of cover applicable in the Member State where the treatment is received (even if these costs are higher than in the Member State of affiliation of the patient). Furthermore, Regulation 1408/71 provides that an authorisation may not be refused if the treatment cannot be provided within a medically justifiable timeframe (for example due to a system of waiting lists)."[47]

A more recent legislative initiative in the field of cross-border health care is the Commission proposal for a Directive of the European Parliament and of the Council on the application of patients' rights in cross-border healthcare.[48] The Directive would cover the following situations:

- Use of healthcare abroad (i.e. a patient moving to a healthcare provider in another Member State for treatment- this is what is referred to as 'patient mobility');
- Cross-border provision of healthcare (i.e. delivery of service from the territory of one Member State into the territory of another); such as telemedicine services, remote diagnosis and prescription, laboratory services;
- Permanent presence of a healthcare provider (i.e. establishment of a healthcare provider in another Member State); and,
- Temporary presence of persons (i.e. mobility of health professionals, for example temporarily moving to the Member State of the patient to provide services).[49]

In particular, the question of temporary presence of persons is closely related to the example of the Austrian tour operator who includes Austrian nurses and doctors on their travels. The proposal for a Directive states that patients would be allowed to receive services in another country without receiving authorisation beforehand as long as a treatment is covered by their home healthcare system. They would pay for treatment and then be reimbursed up to the sum they would have received for the same treatment at home. Under certain circumstances for hospital care, however , a Member State may decide to introduce a system of administrative prior authorisation.[50]

The proposal was blocked at the Council, which leads to uncertainty of whether similar legislation may be proposed in the future on the EU level.

To conclude, there are no real indications of existing legislation on national or European levels that would impinge on the development of social tourism in Europe. Instead, in many cases the existing legislation has, at least to some extent, characteristics that can enable and provide strong support for the development of social tourism. The main barriers to the development of social tourism seem to be related to the context in which social tourism is developed and the current situation in the participating country, as described in relation to the target groups of seniors and people with disabilities.

The Services Directive may indeed help open up the tourism market and thereby make it easier for tourism operators to offer their services in several countries. In this way, the Services Directive can prove to be an important enabler for the development of trans-European tourism.

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[47] Ibid.

[48] COM (2008) 414 final, 2.7.2008.

[49] Ibid, recital 10.

[50] Citizen's summary: Patient's rights in cross-border healthcare. 2 July 2008. Available at: http://ec.europa.eu/health-eu/doc/citizens_summary_en.pdf.

5.7   Seasonality aspects

On the supply side, service providers are interested in extending their season in order to increase the number of visitors and occupation rates during their off-season. The country profiles show that there is a special need of occupation during the months just before and after high season, so between April and June and between September and November. Seasonality varies strongly from one country to another and even from one regional destination to another, depending on the type of product. In this sense, capital cities hardly suffer from seasonality, and mountain and sea resorts do not answer to the same tourism season periods. However, the main point to highlight is that global suppliers are open to propose discounts to Calypso targets before and after high season.

Furthermore, seasonality needs to be analysed as much from the point of view of demand as of supply. Therefore, although there may be a sustainable and healthy level of demand (whether boosted by public or private aid) which might encourage increases in the low season in a specific tourist destination, the latter ought to also combine a series of specific conditions to carry out a de-seasonalising process. For instance, certain conditioning factors could be emphasised which, amongst others, serve to predetermine the possibility of overcoming and acting against seasonality:

Factors conditioning demand	Factors conditioning supply
- Sufficient economic resources: having a pension (in the case of the elderly or disabled) or, alternatively, receive State (or other organism) aid, which will allow the social tourist to meet his/her share of the cost of the trip. - Being in a position to be able to get from A to B, and then have access, in the place of destination, to some kind of health cover, in the case of senior tourists and the disabled. - Assessment of the availability, at the destination, of an adequate supply of complementary services. For instance, leisure activities for children in the case of family holidays. - Climate preferences: in the case of senior tourists, there is a general preference for mild climates, avoiding extremes of both heat and cold. - Specific limitations of an either family-based or social nature. For example, in the case of families, the period of school holidays.	- Supply must be of the appropriate size. - Available places: there are destinations with no low season and practically fully booked all year round - Those supplying the tourist product must be willing to work throughout the low season in order to successfully stabilise bookings and improve their services (this is not always the case in family-run businesses). - The tourist product on offer needs to be of sufficient quality and provide interesting activities to meet the demands of the tourists (which may be different from those on offer during the high season). For instance, in a mountain/ski resort in the high season, ski monitors are needed. In the low season, guides are needed to accompany tourists on small and simple excursions to explain the benefits of the natural surroundings, local dishes and cultural elements.

The consequences of seasonality in the proposals set out in the study have been attempted to be analysed. It is extremely difficult to define the periods of seasonality or low season for the following reasons:

- A destination's seasonality cannot be determined on a State-wide level, but rather on a **territorial** one (city, region, town and so on). It can therefore be asserted that each State has various destinations with differing seasonalities. For instance, in Spain, seasons are not the same from the Canary Islands to the Costa Brava, despite the fact that both are principally sun and sea destinations.

- Seasonality does not depend exclusively on the destination, but on the associated **product** (sun and sea, mountain, city break etc); geographical location is in a two-way relationship with the tourist product that it supplies.

- Seasonality (high, low, medium) is predetermined by three major factors:

a) By the effects of the return yielded by the area itself (climate, location, etc). In other words, there are places which, by their very situation, have an *a priori* cachet (typical sun and sea destination or famous European cities such as Paris).
b) By the product
c) By supply: availability, accessibility, booking levels, etc).

- There are certain associated factors which can influence the movements of target families, such as the periods of school holidays. However, this does not affect senior tourists or, in a lesser extent, the disabled. The young make up a very varied group which, in theory, can move with reference to holiday periods. However, it must not be forgotten that the fundamental factor is their (in general scarce) purchasing power, either through work (their first jobs) or family contributions.

- It could be argued that the fact that holiday periods do not exactly coincide (neither in terms of date or duration) could facilitate tourist exchanges in the social sphere.

5.7.1 Seasonality constraints per target

Having said this, the main goal for Calypso is to assess the seasonality aspects on the demand side. Indeed, one of the postulates of the Calypso preparatory action was that lower prices offered to Calypso targets off-season would be a decisive parameter in increasing tourism stays off-season. The below scheme illustrates how the feasibility for off season travel has been assessed by the respective target group in each country.

Table 16: Seasonality per target group and per country

	Seniors	Youth	Families	People with disabilities
Austria	green	green	red	light blue
Belgium	green	red	red	green
Bulgaria	green	light blue	light blue	green
Croatia	green	red	white	green
Cyprus	light blue	red	red	red
Czech Rep.	green	red	red	green
France	light blue	light blue	red	red
Greece	red	red	white	white
Hungary	green	light blue	white	green
Ireland	white	white	white	white
Italy	light blue	light blue	light blue	green
Latvia	light blue	red	red	red
Lithuania	green	light blue	red	light blue
Malta	light blue	red	red	red
Poland	green	red	red	light blue
Portugal	green	red	red	light blue
Romania	red	light blue	red	green
Slovakia	green	light blue	white	white
Slovenia	light blue	red	red	light blue
Spain	green	red	white	light blue
Turkey	green	red	red	green

- **Seniors readiness to travel off season**
  - Spring and early autumn are the preferred low season periods to travel by seniors in 10 countries - Austria, Belgium, Croatia, Czech Republic, Hungary, Lithuania, Poland, Slovakia, Spain and Turkey. Main reasons are stated as:
    - Lower costs and discounts offered for seniors
    - Better life quality, with the climate not too hot and facilities not overcrowded
  - Off-season travel was seen as acceptable with some reservations in 5 countries – Cyprus, France, Latvia, Malta and Slovenia, for the following reasons
    - Intergenerational holidays: limited to school holidays. For seniors with comfortable income/middle-class, a common situation is to spend main holidays

in the high season, in summer or Christmas, with the children and grandchildren, and then to go off-season for short stays or for longer trips without the family
  - Travel to cooler climate in summer for the seniors living in southern countries
- Off-season travel (or travel all together) is less accepted in Greece and Romania. Main reasons stated are low income and strong family links (take care of grandchildren, house etc).

- **School/student schedules often incompatible with off-season**
  - Constraint for families:
    - Travel habits determined by school holidays
    - Main family holidays are in summer: July to August in most countries, possibly from June to September in few countries
  - Constraint for students depend on country:
    - Availability to travel from July to September in most cases, and June to October in a few cases
    - High sensitivity to low prices offered in June/September/October
    - Duration of stay generally higher than average
  - Off-season acceptable for young workers and unemployed for financial considerations

- **Variety of situations for the adults living with disabilities**
  - No generalisation possible as the season is not the main parameter:
    - Singles and couples versus families with children are more important determinants for availability to travel off season
    - Working versus unemployed have different travel patterns and needs
    - Nature of disability: autonomous versus need for accompanying person
  - Autonomous individual travellers: strong wish to travel just like every other citizen
  - Advantages appreciated off-season:
    - Climate (not too hot)
    - Facilities less crowded
    - Sensitivity to low prices offered from April to October

5.7.2 Impact of lower prices to promote holidays off-season
The table below crosses the current travel habits and trends, as well as the impact of low prices on seasonality. Off-season is understood here from April to November at best, with the condition that the facilities and services needed by the targets offered in season are also offered off-season.

<table>
<tr><td colspan="2" rowspan="2"></td><td colspan="3">Current travel habits and trends</td></tr>
<tr><td>Many stays off-season</td><td>Few stays off-season</td><td>No stay off-season</td></tr>
<tr><td rowspan="3">Impact of low prices on seasonality</td><td>Decisive</td><td></td><td>• Young workers and unemployed
• Individuals and groups of adults living with disabilities with accompanying person</td><td></td></tr>
<tr><td>Incentive</td><td>• Seniors</td><td>• Students
• Adults living with disabilities autonomous travellers</td><td></td></tr>
<tr><td>Irrelevant</td><td></td><td></td><td>• Families
• Adults living with disabilities accompanied by family</td></tr>
</table>

5.7.3 Conclusions to draw out of the seasonality aspects

If the Calypso preparatory action must focus on the development of exchanges off-season so as to improve tourism seasonality patterns in Europe and to generate business and employment opportunities when tourism demand is traditionally low, and considering that the means are limited, Calypso actions should focus in priority on:

Figure 10 Off-season potential of target groups

- Seniors
- Young workers and unemployed
- Individuals and groups of adults w. disability with accompanying person

High market potential

- Students
- Adults w. disability autonomous travellers

Medium market potential

- Families
- Adults w. disability accompanied by family
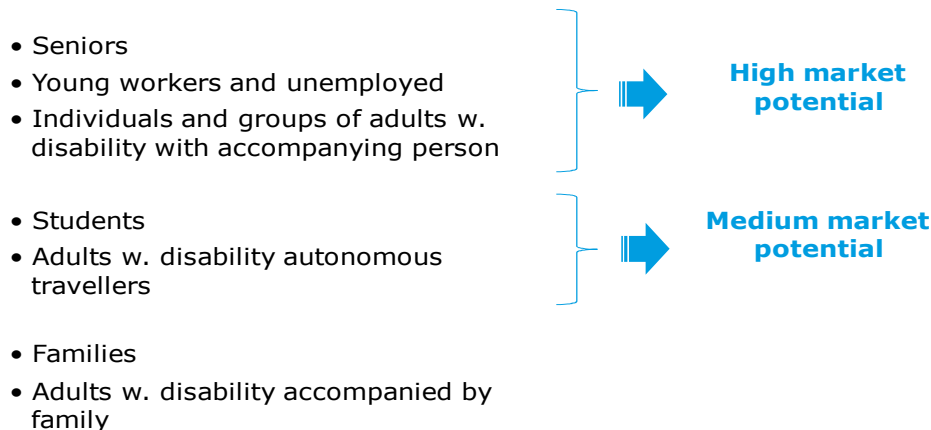
5.8 Criteria for target groups in Calypso

An important aspect in terms of specifying the target groups for whom the Calypso platform should be directed is the definition of criteria. For each target group, a set of criteria should be specified that adequately describes why the persons in question are entitled to receive support for going on holidays.

One criterion most interviewed stakeholders agree upon for all four target groups is their level of income. The appropriate level could be the at-risk-of-poverty threshold, which is applied to the at-risk-of-poverty indicators in the EU, i.e. 60 % of median[51] disposable income after social transfers.[52]

The main issue to be kept in mind is whether Calypso should direct itself exclusively at persons who are not yet travelling (at least not to a great extent). By specifying the level of income as the main criterion for eligibility for support, a very general assessment of the persons targeted by the Calypso mechanism is obtained. However, when looking at the specific four target groups selected for the Calypso preparatory action, the picture becomes somewhat more nuanced. The possible criteria for each target group are discussed below.

5.8.1 Adults with disabilities

The use of the level of income as the main criterion for adults with disabilities should be seen in the light of the specific needs of this target group. As mentioned by an interviewee at the European Commission[53], people with disabilities have, even with an income above the at-risk-of-poverty level, additional expenses both in form of special equipment and accompanying persons (when on holiday) that should be taken into consideration when assessing the level of income.

If the main consideration at hand is to support tourism for people not yet travelling, the question to be asked, especially in relation to the target group of adults with disabilities, is to what extent is this target group already travelling? The general overview shows that the participation rate of people with disabilities is lower than that of persons without disabilities of the same age and social class. Furthermore, one-third of the people with disabilities have never travelled abroad or

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[51] The numeric value separating the higher half of a sample, a population, from the lower half.

[52] See for example Eurostat: Combating poverty and social exclusion. A statistical portrait of the European Union 2010, p. 39.

[53] Erik Somelar, DG EMPL.

participated in day excursions[54]. Moreover, less than half of the people with disabilities in Europe are employed (source: European Disabled Forum). Taking the above into consideration, it could be argued that all persons with disabilities in the participating countries could be targeted by Calypso.

In practice, this would mean that the criteria used could be one of the following (depending on the participating country):
- A recipient of benefits from the state/region or other official organ due to the person's disability;
- A member in an organisation/union or the like, directed at persons with disabilities.

It is the opinion of the study that the concrete membership or type of benefit should be specified by each participating country, since travel for this group will most likely entail national subsidies.

5.8.2 Families facing difficult social circumstances
Concerning families facing difficult social circumstances, the level of income is one of the most relevant indicators. It is currently used as an eligibility criterion for the Italian holiday vouchers.

The United Kingdom Family Holiday Association uses the following four criteria:
1. The family lives on a low income;
2. The family has not been on holiday for the past four years;
3. The family has at least one child of three years of age or over;
4. The family has been referred by a welfare agent[55].

These criteria support the thought that Calypso should direct itself at groups not yet travelling. Concerning the fourth criteria on being referred by a welfare agent, the proposal for the Calypso platform specifies that the main goal of the platform should be to provide information on tourism services for intermediary organisations that can organise and present this information to the families.

5.8.3 Youth
The elaboration of the eligibility criteria for youth depends largely on the extent to which the consideration of targeting people not yet travelling is followed. When this aspect is not taken into consideration, the eligibility criteria for youth can be easily assessed in terms of age.
However, the target group of youth (aged 18-30) includes several different segments of potential travellers, both those who are unemployed and in a difficult social situation, and those already working and able to travel without additional support. Hence, the level of income and the age of the person would be appropriate as the eligibility criteria to be used.

However, it should be noted that subsidised travel for youth in difficult circumstances (unemployment, marginalisation, low skilled) is likely to be controversial in many countries. Unemployment is already an expense in most Member States, and the public support for subsidised travels for the unemployed is likely to be low. This may deter participating countries from focussing on the target group youth for Calypso.

5.8.4 Seniors
As mentioned previously in this report, seniors are the target group most readily available for off season travel, and also the target group already travelling the most extensively. However, travel patterns are likely to be significantly different between countries, and in most countries only a segment of the senior population has the actual means to enable travel abroad for holidays. For the senior targets, median income would therefore be the most appropriate criteria.

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[54] European Disabled Forum
[55] See: http://www.fhaonline.org.uk/singlePage.php?id=77&mpid=11.

5.9   Criteria for supply in Calypso

As shown in Task 2, the improvement of tourism destinations' accessibility is the number one key factor for success of any Calypso mechanism. This implies the accessibility to tourism facilities and equipment must be worked on and the information on the level of accessibility of these structures must be improved.

The Calypso platform should have a key role in the improvement of this information and in the implementation of a common frame of reference to all participating countries, according to standards already developed by national authorities for people with disabilities.

5.9.1 Preliminary remarks on accessible tourism existing norms and labels

If disability has been defined at a European level (based on the UN Convention on the Rights of Persons with Disabilities), European countries have various definitions and levels of requirement concerning the accessibility of tourism facilities.

Many European tourism buildings and sites are still not accessible to people with disabilities.

Nevertheless, some Member States (France, Denmark, Belgium, Great Britain and soon in Italy and Spain) have implemented specific norms and labels. The same kind of initiatives exist at a European level with the Europe for All network under Ossate project, allowing exchanges between countries on specific norms and labels for disabled people.

These good practices should be the starting point for Calypso criteria:
- The most known label approach is the French one, 'Tourisme et Handicap', which has the purpose of providing reliable, descriptive and objective information on accessibility of tourist places and facilities, and takes into account all types of disabilities (physical, visual, hearing and intellectual) (Annex B, Country profile on France).
- In the Walloon region in Belgium, the 'Indice Passe-Partout' evaluates the accessibility of the buildings open to the public (Annex C6).
- The website www.Europeforall.com (developed in OSSATE European project) provides accessibility information about tourist venues in six countries: Austria, Belgium, Denmark, Greece, Norway, Sweden and the United Kingdom). The Europe for All (EfA) database contains the results of individual assessments of venue accessibility based on standard questions and checklists (Annex C7).
- The www.disabledgo.com in the United Kingdom provides personally-surveyed access information and details of over 70,000 venues. Working directly with public and private sector partners across the United Kingdom, DisabledGo researches and inspects all kinds of venues, awards symbols depending of the kind of accessibility, and produces access guides to public venues (Annex C8).

The common basis of these approaches is made of a series of essential questions on the accessibility of the venue, from the parkway to the emergency exit (See Annex for details of questions). The table below presents the main characteristics of types of standards and their differences. The Indice Passe Partout type of standard assesses different degrees of accessibility, and in that sense seems to be the most suitable approach in the framework of Calypso.

Table 17: Main characteristics of accessibility standards

	Label Tourisme & Handicap (France)	Database EfA / OSSATE (Europe)	Indice Passe Partout (Belgium)
Kind of venue concerned	All tourist, sport and cultural facilities including entertainments and outdoor activities (beaches, nature trails, etc)	Essentially hotels and holiday resorts	All public facilities including shops and public services
Structure responsible for	The association Tourisme & Handicaps	ENAT/Ossate under three possible	The association Gamah (action group for better

giving the agreement/label	after an audit on site made by trained auditors on the basis of a national reference table (one auditor representing tourism sector, the other representing the disabled people sector)	assessment procedures : • by venue owner • by an EfA representative on site • by a third-party organisation recognised by EfA	accessibility of the disabled persons) after a visit on-site
Procedure	A series of tables with mandatory criteria (depending on the mobility chain)	A list of questions depending on the mobility chain	A series of questions asked in a precise order (depending on the mobility chain)
Kind of impairments concerned	4 deficiencies : mobility, mental, deafness, visual	Essentially mobility impairments	6 degrees of deficiencies: wheelchair user alone, wheelchair user with accompanying person, ageing person or moving with difficulties, person with visual impairments, person with deafness/hard of hearing, person with difficulties of understanding
Principle	Label defined for a complete autonomy	Different degrees of accessibility	Different degrees of accessibility
Validity	5 years		Revised regularly

5.9.2 The implementation of a common frame of reference for accessibility of people with disabilities in Europe

Only a few European countries have implemented a global approach on disabilities. The analysis of Calypso countries shows the majority of them have specific laws and actions for people with mobility impairments, especially in tourism accommodation facilities. Furthermore, people with mobility impairments represent a major part of European people with disabilities (about 70%).

This kind of impairment implies technical requirements due to the use of wheelchairs, which are easily transferable into concrete actions. Other deficiencies are taken into account in many participating countries, but have an impact on human criteria (specific training of staff for example) which are less uniformly transferable to all participating countries.

5.10 Criteria to assess the sustainability of Calypso tourism offers

It is generally shared nowadays that the tourism industry should have a triple-bottom line approach (environmental, social and economic) and that "the sustainability of tourism concerns particularly important aspects such as competitive and socially-responsible tourism enterprises, the possibility for all citizens to participate in tourism, good employment opportunities in the sector and benefits from tourism activities for local communities. It requires the preservation of cultural integrity, the incorporation of environmental issues and of the protection of heritage resources in tourism measures"[56].

The European general criteria could be based on the following examples of overall criteria, which should be further specified in indicators for environmental, social and business performance and CSR of the tourism suppliers at the national level. In the table below, examples of such national criteria have been developed.

Preliminary remarks on the approach for evaluation of the supply:
- Aims and objectives of the evaluation process should be clearly stated;
- Specific criteria at national level should be transparent and developed by the Member States in consultation with all interested parties and stakeholders;
- Criteria should be largely performance-based according to sound principles of science, engineering, social, environmental and economic management;
- Evaluation processes should be open to all applicants who comply with the criteria; criteria themselves, but also possible costs and fees, should allow participation of small and medium enterprises (SME);
- Compliance to the criteria should be verifiable by trained auditors assigned by the Member States;
- A Calypso national certification label could be given when the criteria have been met for a defined period.

Environmental performance	
National certification	Recognised national environmental certification (if any)
Energy	Consumption / reduction / efficiency / sustainability of energy supply Use of renewable sources and improved technologies For example, hotels equipped with energy-efficient lamps with solar captors
Water	Consumption / reduction / quality Recycling For example, hotels equipped with flow regulators
Waste management (solid and water)	Connection to efficient sewerage treatment Reduction through purchasing and consumption procedures Recycling and re-use Final disposal
Site alteration and life cycle considerations	Appropriate building materials Appropriate protection of habitat and land forms (site disturbance, landscaping, rehabilitation…) Appropriate scale of activities, infrastructure and sensitivity towards sense of place
Purchasing	Sustainability of materials and supplies (recyclable and recycled materials, locally produced, etc) Green purchasing: organic products, eco-labelled products Use of nature-friendly cleaning products
Contamination	Air quality and emissions Noise reduction Transport: public transport / green alternatives provided

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[56] Source: Action for more sustainable European tourism - Report of the Tourism Sustainability Group – February 2007

Environmental information	Interpretation / education for guests Staff training, education, responsibility, knowledge and awareness in environmental aspects

Socio-cultural performance	
Community	Contribution to emphasis and conservation of local / regional culture, heritage and authenticity Minimisation of impacts upon social structures, culture and economy on local / national level Contribution to the development / maintenance of local community infrastructure
Employee training and promotion	Employment of local residents, including in management positions Training for local employees
Socio-cultural information	Interpretation / education for guests Staff training, education, responsibility, knowledge and awareness in social and cultural aspects

Economic and quality performance & Corporate social responsibility (CSR)	
Ethical business practice	Conformity to national laws or international labour standards
Overall business competence	Procedures for reservations, accounting, marketing and administration
Competitiveness	Cost / price ratio + gross margin (direct cost of sales as % of revenue) compared to national industry norms or ratios for similar products
Customer satisfaction	Requirement for consumer feedback regarding quality of the offers and services, and quality of the tourism experience
Health and safety	Conformity to national health and safety regulations Work-related accident frequency rate
Accessibility	Compliance to specified accessibility standards Percentage of guests with disabilities *See recommendations on a common Calypso frame of reference for accessibility*
Employment	Percentage of jobs that are full time, full year Percentage of jobs that are for less than 6 months Salary levels and social security provision, compared to national industry norms or ratios for similar businesses Average salaries of men and women with the same responsibilities Percentage of disabled employees
Employee/HR principles	Clear policy and guidelines on labour standards in accordance with local labour law Pattern, length and consistency of working hours and terms of overtime, sick leave Abolishment of child labour, sexual discrimination, forced, bonded or compulsory labour Recognition of right of employee to be represented by trade unions or other associations and recognition for negotiations on behalf of associations Employee satisfaction
Qualification and training	Number / percentage of employees qualified / certified Employee capacity building / qualifications: programmes for training employees in both aspects of sustainability and core business practices Training funds spent per employee, frequency of training programmes and level of participation

Career progression and opportunities

5.11 Initiatives to ensure SME participation and access to Calypso

During the study, it has been emphasised from different stakeholders, in particular from industry, that Calypso must benefit the SME sector in tourism and not just the major suppliers. This will be important to take into account in any large scale exchange mechanism by ensuring that access to market is not exclusive to large providers or resorts. This will inevitably be the task of participating countries, promoting the tourism supply in a Calypso framework and certifying the supply of services. Specific criteria for SME participation would not make sense in this context, since the structures and markets in participating countries differ to a large extent.

5.12 Conclusions on the target groups and scoping

The differences of socioeconomic situations, age, health situation, etc. cannot allow a global approach per target, but should demand segmentation in order to be as close as possible to specific needs and availability to off-season travel.

The differences of socioeconomic situations, age, health situation, etc. cannot allow a global approach per target, but should demand segmentation in order to be as close as possible to specific needs and availability to off-season travel. If lower prices are a strong motivation to travel off-season (financial barriers remain for all targets the main barrier), it appears that all targets and segments are not equal with free time because of work, school, children, and calendar constraints:

- Families and adults living with disabilities accompanied by family have the lowest availability;
- Students and adults living with disabilities autonomous travellers have an interesting potential;
- The main potential markets for Calypso are principally seniors, then young workers, individuals and groups of adults living with disabilities.

However, the feasibility of concentrating on only one or two target groups and segments in the beginning phase of Calypso will have to be carefully considered. As the Member States would be the main source of financial support, **every Member State should have the possibility to choose which target group to concentrate on or leave out at this stage.**

Our study has shown that while senior citizens and adults living with disabilities are the best potential target groups in terms of seasonality and feasibility of developing a mechanism in the short term, each target group presents a potential market for social tourism, both from the demand and supply points of view. Moreover, creating support for some target groups in the beginning, while leaving other target groups to smaller attention, could potentially create different classes of social tourism. This would be potentially harmful for the future development of support mechanism. It should nevertheless be kept in mind that the creation of a support mechanism, in particular for families facing difficult social circumstances, will require more concentrated effort from the different stakeholders. This is because intermediate organisations will have to be used to a larger extent than the other target groups.

To sum up, it will be important within the Calypso context to set a common framework for criteria, both for supply and demand, in order to have a harmonised approach regarding who the Calypso action should actually support, as well as what demand should be put on the tourism supply.

However, the concrete definition for criteria of the tourism offers varies from one Member State to another. That is why, **at least in the short/middle-term, the definition of Calypso criteria should be twofold (with the same logic than EDEN process):**
  - **At Commission level: definition of general criteria**
  - **At national level:**

       o **Adaptation into specific criteria and concrete indicators**
       o **Definition of the process for control**

The study shows that the participating countries' capacity to develop and engage in a Calypso mechanism is currently limited in many cases. Most countries lack structures to engage in Calypso, and so to say "speak" for the country in matters of social tourism. Without these mechanisms or structures in place, it will be difficult to work strategically with the development of tourism for the target groups in off season, and to provide the necessary support for the target group individuals.

In the subsequent section, the study elaborates on the need for appropriate support structures at the national level as an anchor point for future Calypso work, as well as suggests a framework for criteria for each of the target groups.

6. TASK 3: MECHANISMS FOR THE DEVELOPMENT OF TOURISM EXCHANGES

The study has thus shown that social tourism carries a real potential for the target groups and tourism providers, and in the end the economic and social cohesion in Europe. The study also shows that this potential is currently not realised, due in part to the negative connotation and misinterpretation of the term social tourism, and in part to the reluctance or hesitance to invest in the field from Member States and providers. This is the reason for the EC to also emphasise the economic potential in supporting tourism off-season, for certain target groups.

Main findings from Task 2 clearly show the perceived lack of profitability for the private sector is a barrier to the development of social tourism from the supply side. It is frequently mentioned among suppliers that social tourism is less profitable tourism and that there is little or no incentive for suppliers to engage in it. As this study has shown through the presentation of several good practices showing financial as well as social benefits, this perception among supply is rather limited.

Similarly, on the demand side, limited financial resources for holidays and leisure activities are one of the main barriers for several segments of Calypso target groups (see Task 2) to go on holiday.

At the national level, depending on the country, different types of stakeholders at national and/or regional levels may take care of the targets' holidays through a variety of systems and a variety of criteria. This is already being done on a national level. National authorities are often hesitant towards sending individuals from the target groups to other countries for holiday, and prefer to support domestic tourism. Thus, they are reluctant to subsidise outbound tourism on the one hand, and on the other hand, even if willing to develop inbound off-season tourism, they hesitate to subsidise foreign beneficiaries. This happens, for example, in Spain with the Europe Senior Tourism programme[57]. Some stakeholders, for example in Austria, put forward the risk of distortion in competition. The fear here is that subsidies given to the target groups or directly to the tourism providers would benefit only certain tourism providers.

Public funding in different forms will, according to the study team, be a key factor for success so as to trigger a significant development of Calypso tourism on the European scale. Public investment can take place both through support to suppliers and also through support to the direct beneficiaries or intermediary organisations. In several countries, domestic systems with voucher based subsidies exist, and this form of subsidy would allow for a demand-driven and market-based development of the field.

In the following, the study has developed recommendations for how to support the development of Calypso through strengthening and supporting national structures and initiatives aimed at developing transnational tourism exchange for the specific target groups. The study has also developed some examples of concrete proposals of exchange mechanisms, both in the form of targeted programmes for seniors and more general support through so-called "European Holiday Cheques or Vouchers". The examples have been chosen based on the thorough analysis of barriers and drivers, as well as the good practice study.

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[57] Within the programme Europe Senior Tourism, Spain is subsidising visiting tourists from partner countries: cf. Task 1.

6.1   Support to the national mechanisms and structures

One imminent finding of the study is that national structures at present time are not sufficiently organised and consolidated to engage in Calypso in a consolidated manner. It will therefore be important to dedicate time and resources to build up the structures of each participating country in order to enable a strong structure for European exchange mechanisms.

The participating countries will have to appoint a stakeholder to be in charge of the Calypso platform. Depending on the country, these stakeholders acting on behalf of the participating countries could be ministries, regional authorities, public bodies, etc. The table below presents an overview of the organisational affiliation of National Contact Points in Calypso, most of them anchored within a ministry or a similar organism, as well as an assessment of organisational "readiness" to engage in concrete Calypso actions, i.e. the support and management of actual tourism exchange. The assessment is based on Country Profiles as well as consultations with the involved stakeholders.

Table 18 Overview of national stakeholders and structures

Countries	Coordinators of the national and local stakeholders	Remarks	Organisational readiness
Austria	Federal Ministry of Economy, Family and Youth (BMWFJ) and its department for tourism division	Federal level: little competencies in tourism, focused mainly on promotion. 9 Länder independent in the field of tourism BMWFJ main function: to be the intermediary between the Länder and the international sphere.	Decentralised system, need support in coordinating/consolidating work in the 9 Länder and international field to engage in Calypso.
Belgium	Flanders Tourism General Office of Tourism of Wallonia - Direction of Tourist Attractions and Infrastructure For the region of Brussels: Commission communautaire française - Direction de l'administration des Affaires culturelles	No national level actors involved in the field of tourism, only relevant players at regional level Flanders Tourism: promotes tourism in and towards Flanders and Brussels. General Office of Tourism of Wallonia: in charge of recognition of relevant actors and financing of social tourism. Commission communautaire française for the Region of Brussels: promotes social tourism and is responsible for the allocation of subsidies.	Decentralised system, but established networks and current initiatives within social tourism exists. Could provide support and knowledge to other Member States within a Calypso framework.
Bulgaria	Ministry of Economy, Energy and Tourism	Ministry in charge of particular strategies and programmes for the development of tourism and organising controls on the quality of tourist products.	Will need to develop structures to engage in Calypso.
Croatia	Ministry of Tourism	Ministry conducts the programme "Tourism Without Barriers" and is responsible for the preparation and execution of a social tourism strategy in the near future.	Will need to develop structures to engage in Calypso.
Czech Republic	Ministry of Regional Development and its agency: the Czech Tourism	Ministry's first initiative in the area of social tourism just about to start. Czech Tourism in charge of the promotion of Austrian	Will need to develop structures to engage in Calypso.

		destinations.	
Cyprus	Ministry of Labour and Social Insurance Cyprus Tourism Organisation (KOT)	Ministry is the main structure supporting people to go on holidays. KOT is a semi-governmental structure in charge of monitoring the development of the destination. KOT has been involved in social tourism for two years, working with the ministry.	Will need to develop structures to engage in Calypso.
France	Ministry of Economy, Industry and Employment, Department of Tourism Agence Nationale pour les Chèques Vacances (national holiday vouchers agency) - ANCV	Ministry responsible for social tourism policy ANCV: public body with industrial and commercial character, depending on the Minister of Economy, Industry and Employment and the Secretary of State in charge of Tourism.	Long history and tradition in social tourism, with well defined responsibilities and actors. Could provide support and knowledge to other Member States within a Calypso framework.
Greece	Greek National Tourism Organisation (GNTO)	GNTO: ruling state agency for the tourism sector, supervised by the Ministry of Civilization and Tourism. In charge of planning and implementation of social tourism programs, such as "Tourism for All".	Some experiences in tourism exchange at European level. Will need to develop structures to engage in Calypso.
Hungary	Ministry of Local Government	Ministry responsible for tourism affairs.	Will need to develop structures to engage in Calypso.
Ireland	Departments of Arts, Sport and tourism	Development of tourism industry.	Will need to develop structures to engage in Calypso.
Italy	Ministry of Tourism	Responsible for tourism policy implementation and monitoring.	Highly decentralised, but with a long history and tradition in social tourism. Could provide support and knowledge to other Member States within a Calypso framework.
Latvia	Ministry of Economy and its agency: Latvian Tourism Development Agency	Ministry responsible for making and implementing national policy on development of the tourism sector. Latvian Tourism Development Agency implements national tourism policy.	Will need to develop structures to engage in Calypso.
Lithuania	State Department of Tourism	Entity under the Ministry of Economy.	Will need to develop structures to engage in Calypso.
Malta	Malta Tourism Authority (MTA) Tourism and Sustainable Development Unit (TSDU) within the Office of the Prime Minister	Among MTA's tasks: to promote the tourism destination; to advise the government on tourism operations and on the planning and development of the tourism industry. TSDU is the responsible	Have a clear organisational structure in place, but will need support to engage in Calypso.

		authority for dealing with policy and EU matters relating to tourism. TSDU also acts as the EU directorate for MTA.	
Poland	Ministry of Sport and Tourism - Department of tourism	Ministry is the main body responsible for tourism development.	Will need to develop structures to engage in Calypso.
Portugal	INATEL	Foundation working on social tourism for the Ministry of Employment and Social Solidarity.	Long history and tradition in social tourism, with well defined responsibilities and actors. Could provide support and knowledge to other Member States within a Calypso framework.
Romania	Ministry of Regional Development and Tourism - Committee for Tourism Development	Ministry in charge of the holiday voucher programme and of the promotion of the national tourism off-season offer created by the various Romanian professional tourism organisations.	Will need to develop structures to engage in Calypso.
Slovakia	Ministry of Economy	Ministry is responsible for tourism and is preparing the introduction of a system of recreation vouchers as a tool for supporting domestic tourism.	Will need to develop structures to engage in Calypso.
Slovenia	Directorate for Tourism in collaboration with Slovenian Tourist Board (STB)	Directorate for Tourism: independent directorate within the Ministry of Economy. STB: national umbrella organisation of Slovenian tourism actors with a coordinating and networking role between public, private and civil society. Responsible in particular for: promotion of the destination and linkage of existing products and national programmes.	Will need to develop structures to engage in Calypso.
Spain	IMSERSO SEGITTUR	IMSERSO: management organisation of the Social Security, belonging to the Ministry of Health and Social Policy. In charge of programmes on active ageing and of programmes and services for seniors and dependent persons. SEGITTUR: in charge of European Transnational Programme Europe Senior Tourism	Long history and tradition in social tourism, with well defined responsibilities and actors. Could provide support and knowledge to other Member States within a Calypso framework.
Turkey	Ministry of Culture and Tourism	Ministry's "Tourism strategy of Turkey - 2023" gives importance to social and domestic tourism	Will need to develop structures to engage in Calypso.

It is likely that a future organisation of Calypso will differ from country to country. In most cases, ministries are not actively involved in operational matters relating to tourism, and the countries will need to set up cooperation with other organisations, such as associations and NGOs, to undertake work in relation to Calypso.

In a few countries, structures and collaboration have already been established (France, Spain, Portugal, and Belgium). Collaboration between these practices and other participating countries will be beneficial in providing lessons learned, advice etc on how to engage in social tourism.

It is therefore recommended to focus on setting up close cooperation between different participating countries in order to test different ways of organising and implementing the future Calypso actions. The mechanisms tested will most likely be target group oriented, but must also ensure that both supply and demand can be handled under the same umbrella, i.e. that the control of eligibility for Calypso of both supply and demand is ensured.

6.1.1 Proposed actions to support development of Calypso

On the basis of the findings of the study, **it is suggested that concrete support, financial and advisory, is given to the Member States to engage in the second year of the Calypso Preparatory Action by launching a Call for Proposals.** It is the recommendation of the study team that the call for proposal be launched with a requirement to collaborate between three or more Member States as a way to stimulate exchange and cooperation.

The exact outline of a Call for Proposals will need to be developed by the Commission, but it is the recommendation for the study team that it has the following as an overall objective:

- To develop and strengthen organisations and structures in order to enable concrete participation in future Calypso actions

To achieve this, the specific objectives of the support could be to support:

- Knowledge exchange and sharing of experiences between Member States, in particular regarding organisational set-up (for example by collaboration between experienced and less experienced countries in social tourism)
- Facilitating concrete exchange pilots (for example by feasibility studies, cost benefit analyses of concrete proposals, support to planning and coordination)

In terms of activities eligible for support, this will need to be defined by the Commission. However, it is a strong opinion of the study team that proposals should aim at being as concrete as possible, aiming at developing actual exchange. This will be important in order to enable future informed decisions on whether to engage or not in the development of Calypso Actions. In the following, the study team has outlined some examples of concrete exchange mechanisms which could be further analysed and developed in specific country contexts.

6.2   Calypso actions for senior citizens

Existing models directly focuses on the senior group and are based on symmetric or bilateral exchange and asymmetric or demand-driven exchange. The following extract has been written based on the best practices pointed out earlier, and may serve as the seeds of a transnational exchange programme for tourism in the EU. In principle similar programmes could be set up for any of the target groups.

Tourist exchange in Europe	
Objectives	- Increase employment - Lengthen season - Strengthen the feeling of European citizenship - Implement/improve regional/local economies through the development of social tourism
Specific Objectives for Social Tourism	- **Increase the number of trips made in the low season.** - Increased travel of the population groups that can make trips in the low season, with the following results: - Employment increases basically at the destination as well as at the place of origin - De-seasonalisation - Strengthening of a sense of European citizenship - Boosting effect through regional/local agreements - Improvement to the quality of life of the elderly - **An increase in the benefits for the countries and individuals who are involved**
Basic Models	- Programmes between two or more countries - Exchange programmes (symmetric) - Exchange programmes (asymmetric)
Development	1. The three programme types are compatible and, in many cases, complement each other. 2. Taking the current situation of tourism in Europe as the starting point, and particularly that of social tourism in terms of launching a short-term programme, the latter would be more viable approached asymmetrically. What is proposed is an elaboration of concepts of Europe Senior Tourism as promoted by Segittur. 3. Those countries that participate in the programme must do so with the specific support of the State in order to guarantee quality in supply, as well as the particular fulfilment of the (profile) criteria in demand. 4. The direct involvement of the EC could range from a minimum, which would be the creation of a single platform to identify supply and demand, to a maximum, which would involve programme funding. Between these two poles, a series of initiatives which include the creation of structures and the earmarking of resources for the programme can be identified.

6.2.1 Scenarios for financing mechanisms

The funding system should be tailor-made to each programme and be flexible in order to adapt to each of the participating countries. However, a good deal of the basis for success in terms of the running of the programme lies in its financial transparency and profit distribution. It is therefore crucial to establish a common basis on which its running can be guaranteed:

a)   Calculation of the cost of places

The cost of places will be financed by each agent in different percentages, as dictated by the interested parties, with the cost shared as follows:

- The tourists' **destination** state can contribute both directly and indirectly to supply in order to promote bookings;
- Supply at the **destination** can take on part of the cost by reducing prices in low-season in order to increase bookings or extend the length of their season;
- The tourist can pay the cost of the trip in his/her place of **origin** at a price lower than normal due to discounts on offer, thereby allowing for a greater number of trips to be made;
- The tourists' state of **origin** can decide to subsidise the trips of those tourists in greatest need, thereby reinforcing the social aspect of the programme.

Those who will benefit at the place of origin
- Target groups: tourists who have made trips on other occasions and those who have never travelled will both be able to make trips at reasonable prices to new destinations, thereby improving their quality of life.
- Intermediary travel agents: in order for the programme to run well, it will need the active participation of travel agents in the place of origin who will promote tourist products and manage groups. They will therefore be able to increase their business opportunities.
- Transport: transfers will be contracted at the place of origin, thereby providing extra business for transport companies.
- The State: on the one hand, by improving the quality of life of the target groups, social and medical costs will come down. On the other hand, there will be extra business for travel agents and transport companies, as well as for other related individuals, from the health-care assistants who accompany the groups to guides and accompanying public relations representatives. This increase in business will have a knock-on effect in reducing unemployment benefit payments, in increasing social security and tax payments, and, by extension, improving the finances of the state of origin.

Those who will benefit at the destination
- The tourist industry (operators, accommodation, restaurants, other related service suppliers) will see their increased activity translating into improved profits.
- State / De-seasonalisation: maintaining tourist product supply throughout the year, and with it those jobs involved in it, will lead to increased earnings for the private sector at times of the year when it is normally dormant, as well as a fall in unemployment within the tourism industry and the sector's increased professionalisation. All of this will have a direct repercussion on the finances of the destination country by reducing the levels of unemployment benefit payments and by increasing levels of tax paid (VAT, income tax, corporate tax).

Another model deserving special mention that already exists in some countries is funded by the health systems as a way to prevent or improve physical conditions in persons in need of care or rehabilitation. An example of a concrete mechanism for spa tourism is developed and presented in a following section of the report.

Other models applied so far to other groups, such as cheques or cards, could perhaps be applicable for the seniors. However, they have different disadvantages, such as the difficulty of use by the seniors or difficulties in deciding the agents involved and financing. This last topic is revealed in all groups and models as one of the key elements to take into account.

In future Calypso actions, criteria for which targets to support are important to define. Seniors are arguably presented as the most "easy" and feasible target group due to flexibility and interest for off season travels, a growing demand from active seniors etc. However, it must be acknowledged that the standard of living of seniors differs to a very high extent between countries in Europe, and for some segments of the seniors' population, transnational travel will not be possible without specific support. Thus, it is the study team's recommendation that criteria in terms of financial means be developed for the senior target group, thereby minimising the risk of distortion of competition.

6.3 European Holiday Vouchers

Among the good practices studied in Task 1, it transpires that four countries have implemented similar holiday vouchers mechanisms at the national level. None of these voucher schemes however function at a European level or in any other Member States, i.e. they are bound to the national market.

A European or multilateral voucher system would have significant benefits in terms of facilitating exchange by enabling support directly to the traveller without involved cash transfers, thus limiting the risk for distortion of competition. Implementation of a European scheme would however be rather complicated, as no pan-European organisation for managing such a scheme exists today. In the following section, the study team outlines the principles of the existing systems and also suggests some strands for future study and elaboration towards assessing the feasibility of a transferable system between European countries.

6.3.1 Existing mechanisms in participating countries

Four countries have implemented mechanisms of holiday vouchers among the 21 participating countries in the Calypso study – France, Hungary, Romania and Italy – and others have shown their interest – Slovakia and the Czech Republic.

The four existing mechanisms have their own specificities, but basically the scheme involves four types of players:

- **The issuers**
  One stakeholder (France, Hungary) or several stakeholders (Romania) issue the vouchers, sell them to the clients and refund them to the tourism suppliers.
  The issuers invoice the clients and/or the suppliers with a commission.
- **The clients**
  Private firms, public institutions, social partners (works councils and social action committees) buy the vouchers to the issuers (price is a commission of the vouchers issued) and give them to their employees according to their own rules of participation and attribution conditions. In some cases for the firms, the vouchers are deductible from taxable benefits under certain conditions.
- **The beneficiaries**
  Employees and civil servants receive the vouchers from their employer. In some cases, it is 100% free, while there is a contribution from the beneficiary in other cases.
  All employees/civil servants are concerned, whatever their level of income.
  They use the vouchers as they like within the network of suppliers affiliated to the issuer.
- **The tourism suppliers**
  Each issuer organises his own network of suppliers who accept the vouchers as a means of payment from the beneficiaries, and then the suppliers refund the vouchers from the issuer (paying a commission).

Figure 11: Mechanisms for holiday vouchers
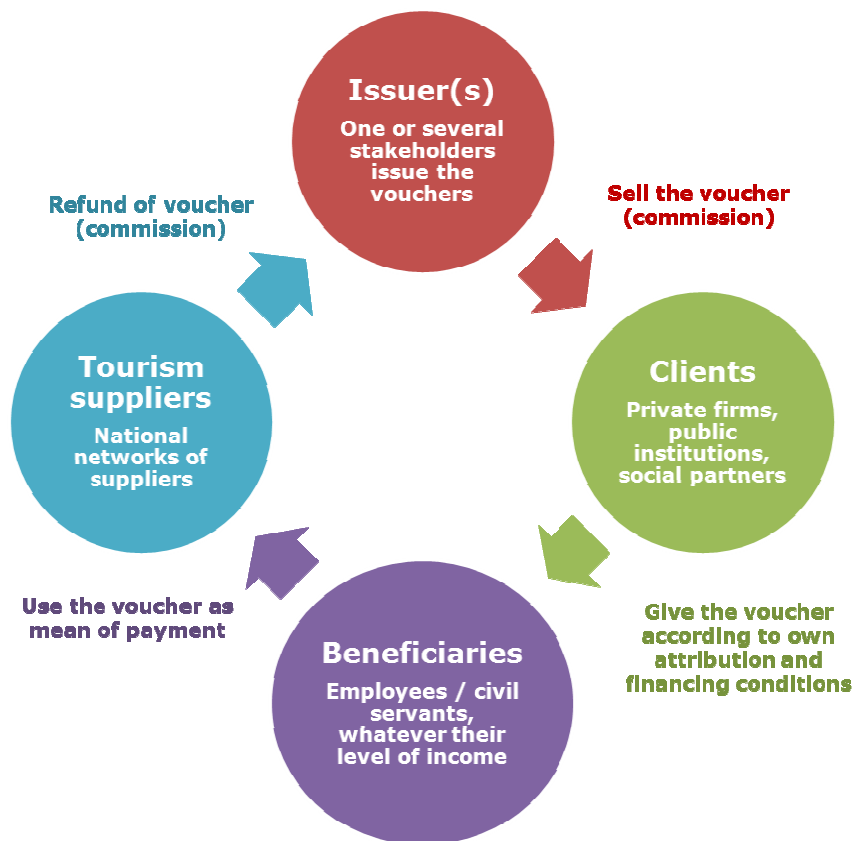
As they are, these mechanisms cannot be transferred to the Calypso level for two reasons:

- The current beneficiaries are not necessarily Calypso targets, and moreover the channels of distribution do not easily and directly enable the reach of Calypso targets.
  France, Italy and Hungary do have specific social mechanisms targeting socially disadvantaged people, but the regular mechanisms target employees and civil servants.
- The mechanisms have a national, and not a European, basis.

Mechanism	Beneficiaries	Clients	Issuers	Tourism suppliers	Financing
Chèques-vacances Holiday vouchers France	Regular mechanism through employers: Main target group are employees from firms with affiliated social partners (recently open to firms with less than 50 employees) or public bodies. Every employee is concerned whatever the level of income. About 3 million of holiday vouchers holders in 2008, i.e. 7 million people. Average amount of holiday vouchers per home is €400.	Social partners (works councils and social action committees) contract with ANCV. They give the vouchers to their employees, determining themselves the level of participation and the attribution conditions.	Agence nationale pour les Chèques Vacances (National Holiday Vouchers Agency): public body with industrial and commercial character.	Network of 160,000 tourism suppliers in France which have contracted with ANCV: accommodation, catering, sport leisure, cultural activities, transportation, including spots or activities for people with disabilities.	• Employees' saving constitute a budget for holidays (53% of vouchers issued). • Contribution from the employees: part of the budget is financed by works councils (26%). • Donation from employers without any contribution of the employees (23%). For the firms, the holiday vouchers are deductible from taxable benefits under certain conditions. Commissions paid to ANCV: • 1% by clients when they buy the vouchers. • 1% by the suppliers when they ask for refund of the vouchers.
	Social mechanism "Aides aux projets vacances": Regular tool extended to people facing social and financial difficulties selected by a network of charitable associations: families with difficulties, young people, people with disabilities, seniors. 43,000 beneficiaries in 2008.	ANCV supports a network of 36 charitable associations: e.g. Secours Populaire, Restos du Cœur, Vacances Ouvertes, etc. They offer them to their targets.			The surplus of (unused) regular holiday vouchers is given by ANCV to charitable associations. They are complementary to other financial supports (associations or local authorities) and the participation of the beneficiaries (no free stays are accepted in the programme).

Mechanism	Beneficiaries	Clients	Issuers	Tourism suppliers	Financing
Recreation cheque system Hungary	<u>Regular mechanism through employers</u>: • Employees (and family members) from economic corporations and other companies. • Public servants and civil servants (and family members) from budgetary establishments and local governments.	• Economic corporations and other companies for their employees and their family members. • Budgetary establishments and local governments for their public servants and civil servants and for their relatives.	Hungarian National Foundation of Recreation (HNFR)	Cheques accepted in 10,000 places: accommodation, transportation, festivals, thermal bath, leisure sports, culture, etc.	Employer purchases the recreation cheque in full and pays 25% of the cheque's value in tax + an additional tax of 5.5% to the HNFR
	<u>Social mechanism</u>: Socially disadvantaged people • Families; • Pensioners; • People with disabilities; • Trainees. The Foundation invites tenders: the applicant has to complete a form, and if all requirements are met, is given support. The maximum amount of a recreation cheque is €150.	The Foundation is in co-operation with 150 organisations in introducing tenders, helping the people concerned fill in the forms, preliminary selection, posting, ensuring the own share and their later use.			Recreation cheques are given by the HNFR to socially disadvantaged persons, through open tenders. The applicant receives recreation cheque by paying a contribution, depending on the incomes, the social situation, etc. (37.5% average contribution rate). Beneficiaries often receive additional funds from trade unions and NG0's and usually have a final contribution of 25% of the value of the recreation cheque.
Buoni vacanze Italia Holiday vouchers Italy	Low-income families.	Families. They can apply for holiday vouchers directly through the Holiday Vouchers Association website.	Italy Holiday Vouchers Association. Furthermore, the Association of Italian Municipalities (ANCI) has signed a protocol of support for the Holiday	The holiday vouchers can be spent immediately at any of the tourism businesses or to pay for any of the tourism services indicated in the Italy Holiday Vouchers Guidebook or online on the website:	Depending on the size of the family and its net income, state contribution varies. The family has to pay a specific percentage of the voucher within 10 days of booking it, and the rest will be financed by the state. The state contribution varies between 20-45% of the total value of the voucher.

			Vouchers with F.I.Tu.S.	www.buonivacanze.it.	
Holiday vouchers Romania	Employees and public servants. Every employee is concerned whatever the level of income. So far, holiday vouchers were mainly given by public administrations to the civil servants (70%).	Public institutions and private firms.	Main private companies issuers: Romticket, Accor, Sodexo, Cheque Dejeuner, Ticket Plus, Bluticket, Euroticket, etc.	Each issuing company has its own policy and shows on its website the units that accept their vouchers Ex.: vouchers issued by Accor are accepted by more than 2,000 accommodation units, travel agencies or restaurants.	The firms/public institutions purchase holiday vouchers in full: no participation of the employees and no grant from the state. The holiday vouchers are tax-deductible. Commissions paid to the issuers by the suppliers when they ask for the refund of the vouchers: • 2.5 to 7% for travel agencies • 10% for accommodation

6.3.2 Assessing the feasibility of a transnational system

In an assessment of a trasnational system with holiday vouchers, the same mechanisms as national systems present will need to be defined. Below, the study team has outlined the different aspects which would need to be assessed and resolved in order to put a transferable system in place, for example by plurilateral agreements between countries with systems already in place, or other interested countries. The team has chosen to take an approach where a voucher scheme does not exclusively target Calypso beneficiaries for two reasons. First, it would be important to stimulate "holiday for all" rather than "holiday for marginalised groups", and second, a more European scheme will need to have a certain volume to be sustainable.

- **The issuer**

  In the existing examples, the issuer is a private or semi-private company mostly operating on a not-for-profit basis. This will most likely be the appropriate solution in a transnational scheme as well, since a pan European public sector entity does not exist which could manage a scheme.

  A key challenge would be to define how the actual stimulation and start-up of a scheme could be undertaken. The system must be based on not-for-profit principles in order for a European system to be launched with support from Member States (and possibly the Commission); any other solution would be contradictory to EU rules on competition.

  The issuer will need to negotiate several types of partnerships with the clients in each participating country:
    - Partnerships with stakeholders working specifically with Calypso targets
    - Partnerships with suppliers which qualify for Calypso criteria

  The issuer should be in charge of the communication actions relayed by the participating countries, as well as the quality control of offers.

- **The clients**

  The clients act as intermediary organisations between the issuer and the beneficiaries.
  They can potentially be any type of stakeholder:
    - Member States, public bodies (as for example stakeholders currently in charge of the existing mechanisms in France, Hungary, Italy and Romania)
    - Regional or local authorities
    - Social partners in private firms (works councils and social action committees)
    - At national/local level: not-for-profit associations, parishes, trade unions, etc.

  The clients must decide on the number and type of beneficiaries they are targeting, and the amount of vouchers they are ordering from the issuer.
  Two types of clients can be considered:
    - The stakeholders/clients working specifically with Calypso targets, with or without providing subsidies (i.e. paying part of the cost of a voucher).
    - The other stakeholders (for example employers, associations etc) buy vouchers from the issuer, with or without providing subsidies.

- **The beneficiaries**

  Two types of beneficiaries can be considered:
    - Calypso targets: intermediary organisations provide them with vouchers. In order to ensure that they will indeed use the vouchers, the targets should contribute with a percentage of the amount (to be defined by the intermediaries), i.e. buy the vouchers at a reduced cost.
    - Mainstream beneficiaries: mainstream stakeholders distribute vouchers with a percentage of the amount (to be defined by the intermediaries), i.e. buy the vouchers at a reduced cost.

  The beneficiaries can use vouchers as money as they like in the participating countries within the affiliated network of suppliers, including transportation, accommodation, restaurants, leisure activities, sports, museums, festivals, etc.

- **The tourism suppliers**
  The issuer organises their network of suppliers in each participating country and presents it on a dedicated website with a search engine enabling the research per country and per type of product.
    - The suppliers accept European vouchers as means of payment from the beneficiaries, and then get it refunded from the issuer. It should be investigated whether the suppliers should pay a commission to the issuer. In a first instance, this might hinder the recruitment of suppliers in a European scheme. It will also be important to ensure swift refund, as many smaller suppliers will be dependent on cash flow.
    - To target off season, it can be agreed with the supplier on the periods/seasons of the year when they accept vouchers.
    - The issuer also negotiates with the suppliers so that they provide discounts and preferential offers when a beneficiary is using vouchers.

As mentioned initially, the development of a transnational voucher scheme for holiday would per definition entail many challenges. However, it is the view of the study team that such a voucher scheme could potentially answer to many of the obstacles being present today in terms of support mechanisms for increased tourism exchange for the target groups, notably:

- The issuer would be responsible for quality control of offers on the European level per pre-defined criteria on accessibility and sustainability. This would alleviate the need for state structures carrying this responsibility.
- The clients (intermediary organisations) would be responsible for defining and selecting which target groups to support, as well as the level of support. This can be done with or without basic principles for the criteria at European level.
- The beneficiaries would be "open", i.e. it would not be exclusive to certain target groups only, but also to other travellers wishing to benefit from off-season travel. This will reduce the exclusivity of Calypso and potentially increase the number of travellers overall.
- The suppliers would benefit of a marketing structure, and it would enable criteria to be set for SME participation. In this way it could be ensured that not only mainstream suppliers and big operators benefit from Calypso.

A voucher scheme could in principle be set-up between any number of countries wishing to engage in a transnational voucher scheme. Hence it would be possible for interested countries to pursue this idea further during next year's preparatory action. In particular, countries with already existing systems and structures could pilot collaboration agreements.

6.4   Developing a health tourism exchange program at the European level

Spa tourism is considered by several private and public stakeholders in most of the European countries to be closely related to social tourism because tourists are often subsidised by public authorities for their spa stay. There are a number of aspects that could support the development of spa tourism as a part of the Calypso framework. These include, among others, the already existing public financial support and exchange mechanisms in participating countries. For example, German tourists are reimbursed by their social insurance for treatment they received in Lithuania. Also, Bulgarian, Romanian and Hungarian public authorities are already subsidising their citizens' thermal journeys. Their national pension funds or social insurance funds already reimburse an important part of the treatment cost, as well as the journey accommodation, travel and catering cost. The existing criteria for participation on demand and supply side would also support the development of spa tourism as a part of the Calypso framework.

In a first stage, the health tourism exchange programme could focus on **two target groups,** the seniors and the adults living with disabilities. It could then easily be enlarged in further steps to the other target groups. One of the principal aims of the pilot project could be to begin on a small scale, to create a common system that will overcome the possible limitations that may appear on the choice of provider or on other domestic planning. This common system would help clear any unanswered questions and doubts that the intermediary organisations and/or the healthcare commissioner may have concerning the quality of accommodations and treatment offered by a provider in another state. A mechanism for sharing information concerning the supply is essential for the development of exchange in the field of health tourism. The Calypso platform could prove to be useful in this respect.

One aspect hindering the development of exchange in the field of health tourism is the current stand-still in the European legislation in the field of cross-border health care due to the fact that, as mentioned above, the Directive concerning the application of patients' rights in cross-border health care was blocked in the Council.

The development of a health tourism exchange programme could follow from the experiences gained by Portugal and Spain through the Europe Senior Tourism programme. A similar mechanism could be used in terms of health tourism exchange. In the wealthier countries, the public authorities may allocate special grants for the spa resorts that will receive foreign seniors with low income to complete the issuing state subsidy. The expense balance for the state will remain positive, as the treatment costs for their insured citizens sent abroad and the reimbursement amount will be lower in the framework of this exchange programme. Funding could be found in Interreg and cross-border cooperation (CBC) programmes, such as the CBC programme between Romania- Hungary-Slovakia-Ukraine or the Interreg IV C program.

Possible future activities include the launching of a feasibility study in order to:
- Facilitate the common recognition of the national existing criteria on the supply side (hotels, spa centres).
- Create, if necessary, a cooperation framework between national insurance funds of the participating countries that can be extended in a second stage.
- Build health tourism packages with spa organisations of the participating states. In some cases, these offers already exist.
- Create a specialised platform to provide information on conditions of accommodation and treatment in the participating countries (if possible, the Calypso platform should be used to ensure that all relevant information is collected under one umbrella and that funding is not directed at developing several tools).

Health tourism exchange program	
Project scale	All Member States and candidate countries can participate in the mechanism.
Targeting	The mechanism is designed during the first stage (pilot project) for the seniors and the adults living with disabilities group and will be extended to the other target groups.
Institutional framework	• Calypso programme • EU-Funded Cross Border Cooperation programme
Public & Private stakeholders	• National health and/or pension insurance fund of the respective countries • Spa tourism organisations • Unions of people with disabilities and for seniors
Financing	<u>Co-funding for Calypso targets</u>: • National, regional or local public authorities and national health insurance funds according to existing national legislation • Beneficiaries <u>Co funding for the supply side (mainly local public authorities and NGO's)</u> • CBC & INTERREG programs <u>No financial contribution of the Commission.</u>
Base models	Programmes between two or more countries • Exchange programmes (Symmetric) • Exchange programmes (Asymmetric)
Tourism cross border and off-season offer for the Calypso target groups	• Strong demand of wellness and treatment holiday by seniors, people with disabilities, and families facing difficult social circumstances because of one of its member's illness • Specifically equipped accommodations with a focus on accessibility • Specially trained personal and medical staff • Off-season discounted prices • Various tourism activities and facilities in traditional spa thermal resorts

7.   TASK 4: CALYPSO PLATFORM

7.1   Preliminary remarks on Task 4

The Calypso study includes a specific task on the web portal:

TASK 4: To identify ways and means to increase the attractiveness of the schemes amongst stakeholders from the demand and supply side of each participating country.

The terms of reference present the aim of the Calypso web portal. Initially, the Commission intended to develop that tool in parallel with the study:

*"A parallel initiative to be undertaken by the European Commission (extraneous to this call for tenders) is the setting up of **a Calypso web portal which would list all stakeholders (supply/demand) interested in providing services/organising groups** as part of the scheme. The exercise will eventually be carried out in collaboration with tourism experts and Member States/Candidate Countries (national/regional/local authorities), who will be requested to validate the list. The portal (which would be launched in 2010 and would need to be updated regularly) would thus **be a tangible platform serving as a tool that facilitates tourism exchanges in the low season and that allows interested parties to interact accordingly**."*

The Commission decided to defer its own work on the web portal, awaiting the outputs of the study.

The objective of Task 4 is thus to specify the possible functions and set-up of the web platform (hereinafter Calypso platform).

7.2   Objectives and functions of the Calypso platform

The Calypso platform is not an exchange mechanism in itself, but rather a tool to support Calypso mechanisms. This tool should be flexible according to the specific needs of each target. At the time being, it is clear that the necessary mechanisms at national level are not in place to launch and promote a Calypso platform. However, with the findings of the study and on the basis of consultations held, a tentative approach to developing a Calypso platform is suggested.

The following table breaks the four targets into segments according to their expectations that the Calypso platform will be able to fulfil.

TARGET SEGMENTS	NEEDS AND OBJECTIVES FOR CALYPSO PLATFORM	FUNCTIONS AND FEATURES OF CALYPSO PLATFORM			
		Access	Content/Supply	Marketing	Management
Young autonomous people FIT[58]	This segment already uses a wide range of websites offering mainstream low prices or specific programmes and discounts for youth: - Network of European programme web sites focusing on intercultural learning, volunteering, informal learning - European Youth Card web site - Specialised providers web sites: youth hostel associations, InterRail, Eurolines, etc. - Mainstream low-cost company websites and mainstream price comparers with search engines linked to many suppliers worldwide. The possible added-value for a Calypso platform is to reference the existing web offers and present their specificities so as to centralise the information and guide the young travellers.	General public open access.	No supply on site. Link to the web sites mostly used by the segment offering mainstream low prices. Information on possible support available from public authorities or intermediary organisations on specific programmes and discounts for youth.	Promotion of the platform in each participating country through: - Member States (national/regional/local authorities) - Existing network of European programmes' local desks - The largest number of partners possible	Light need in management as the most demanding action is the coordination of the promotion in each participating country
Young non autonomous people	This segment needs significant support from intermediary organisations (public	Limited access for intermediary organisations	Discounted offers specially shaped for Calypso youth by	Directly on Calypso platform: Information on the stays	Significant need in management: Partnerships with

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[58] FIT: Fully Independent Traveller (individual tourist, as opposed to tour groups)

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First-time travellers	national/regional/local authorities, not-for-profit associations, social workers, etc.) in each step of the holiday trip: financing organisation of transport, accommodation and activities; accompaniment during the stay. The objective for the Calypso platform is thus to support these intermediaries in facilitating their access to discounted offers dedicated to the youth.	supporting the youth.	suppliers having a partnership with Calypso web portal.	through a search engine • Availability of the offer • Reservation or link to the supplier's own web site • Payment online or link to the supplier's own web site.	the intermediary organisations • Partnerships with the suppliers • Organisation and update of the offers to put online.
Adults living with disabilities All segments	Main barriers to go on holiday for the entire target group of adults living with disabilities are the lack of accessibility of the transport and various components of the destination, and the lack of information on the accessibility conditions of these facilities. The very first objectives for the Calypso platform are thus: • To promote the improvement of accessibility conditions in each country • To facilitate the access to the information.	Limited access for participating countries and intermediary organisations working on accessibility.	Forum: space for dissemination of good practices, discussion, exchange of experiences between stakeholders.	Promotion through the participating countries of the platform towards the intermediary organisations working on accessibility in each participating country	Light need in management: coordination of the promotion and the organisation of the forum.
		General public open access.	Information on the accessibility conditions of the destinations through a search engine. Information on possible support available from public authorities or intermediary organisations.	Promotion of the platform through the participating countries and the intermediary organisations.	Development and promotion of a European frame of reference as a grid applicable to all participating countries' tourism facilities.
Autonomous adults living with disabilities	This segment is mobile and financially autonomous. They generally have a strong wish to travel just like every other	General public open access.	Discounted offers specifically shaped for FIT adults living with disabilities by suppliers	Directly on Calypso platform: • Information on the stays through a search engine • Availability of the offer	Significant need in management: • Partnerships with the suppliers

FIT	citizen, i.e. mainly with friends and family in high season. The objective for the Calypso web portal is to encourage them to travel abroad off-season.		having a partnership with Calypso platform.	• Reservation or link to the supplier's own web site • Payment online or link to the supplier's own web site.	• Organisation and update of the offers to put online
Adults living with disabilities travelling in groups	Citizens with a disability in this segment have various degrees of autonomy in terms of both mobility and financial resources. They go on tour groups for different reasons: • Some of them are more at ease in a group through fear of the unknown and discrimination • Some disabilities require specific care which is found more easily in a tour group than in a FIT formula • Some others have low income and are dependent for their holiday upon a subsidy that takes the form of tour groups. In order to develop the tour groups abroad off-season, the objective for the Calypso platform is to facilitate the access to discounted offers for groups involving accessible equipments and facilities: • For the citizens directly • For the intermediary organisations supporting the adults living with disabilities:	General public open access.	Discounted offers specifically shaped for groups with disabilities by suppliers having a partnership with Calypso platform. Good practice to transfer: BSV - Bourse Solidarité Vacances – France.	Directly on Calypso platform: • Information on the stays through a search engine • Availability of the offer • Reservation or link to the supplier's own web site • Payment online or link to the supplier's own web site.	Significant need in management: • Partnerships with the suppliers • Organisation and update of the offers to put online.

	public national/regional/local authorities, not-for-profit associations, etc.				
Seniors (all segments)	Some seniors may have some barriers of going on holiday, such as the lack of accessibility of various components of the destination, the price, and sometimes the fear of going abroad. Also, they have certain characteristics, such as routes, (adapted, less visits, a bit more quiet), accommodation needs, certain degrees of comfort, nutrition should be adapted, medical services, and activities of their interest and adapted to their capabilities.	General public open access.	Information on supply with the special characteristics covering the needs of seniors – tourist packages- from the different countries of destination: • General information on the tourist packages • Information about the stakeholders involved • Information about destinations.	Directly on Calypso platform: • Information on the different programmes available • Information on the stays through a search engine • Availability of the offer • Possibility of reserving and booking seats once identified • Redirection to the intermediate stakeholders in each country to allow booking.	
	It is a target that may need significant support from intermediary organisations, public national/regional/local authorities, social workers, etc. in each step of the holiday trip, including financing; organisation of transport, accommodation and activities; and accompaniment during the stay. The objective for the Calypso platform is thus: - To give information to the target group about all travel possibilities	Limited access for participating countries and intermediary organisations working with seniors. Limited access to identified seniors.	Information on the tourist packages, with prices and discounts, destinations and stakeholders.		Significant need in management: • Partnerships with the suppliers • Organisation and update of the offers to put online • Management of the identifying processes.

	- To be an identifying platform for the members of the target (through card or identity card) - To support intermediaries in facilitating their access to the special packages dedicated to seniors.				
Families facing difficult social circumstances (all segments)	Families facing difficult social circumstances are generally highly price sensitive. Thus the main barrier for going on holiday is financial. Moreover, this group is to a large extent unavailable for travelling off-season, which is why financial constraints become even more pronounced.	Limited access for participating countries and intermediary organisations working with families facing difficult social circumstances.	Discounted offers specifically shaped for Calypso families by suppliers having a partnership with Calypso platform – directed at intermediary organisations instead of individual buyers.	Directly on Calypso platform: • Information on the stays through a search engine • Availability of the offer • Reservation or link to the supplier's own web site • Payment online or link to the supplier's own website.	Significant need in management: • Partnerships with the intermediary organisations • Partnerships with the suppliers • Organisation and update of the offers to put online.
	The main need of this target group, with respect to the platform, is to have easy access to all information on discounted or subsidised tourism services directed at families. In particular, with respect to families with social problems (such as alcoholism, unemployment etc.), there is a need for a platform that provides information on tourism services for intermediary organisations that can forward this information to the families.	General public open access.	Information on possible support available from public authorities or intermediary organisations.		

7.2.1 Scenario of mechanism for Calypso platform

Based on the consortium's recommendations presented above, the following schemes present a synthesis of the proposed mechanism

Figure 12 Scheme of Calypso Platform
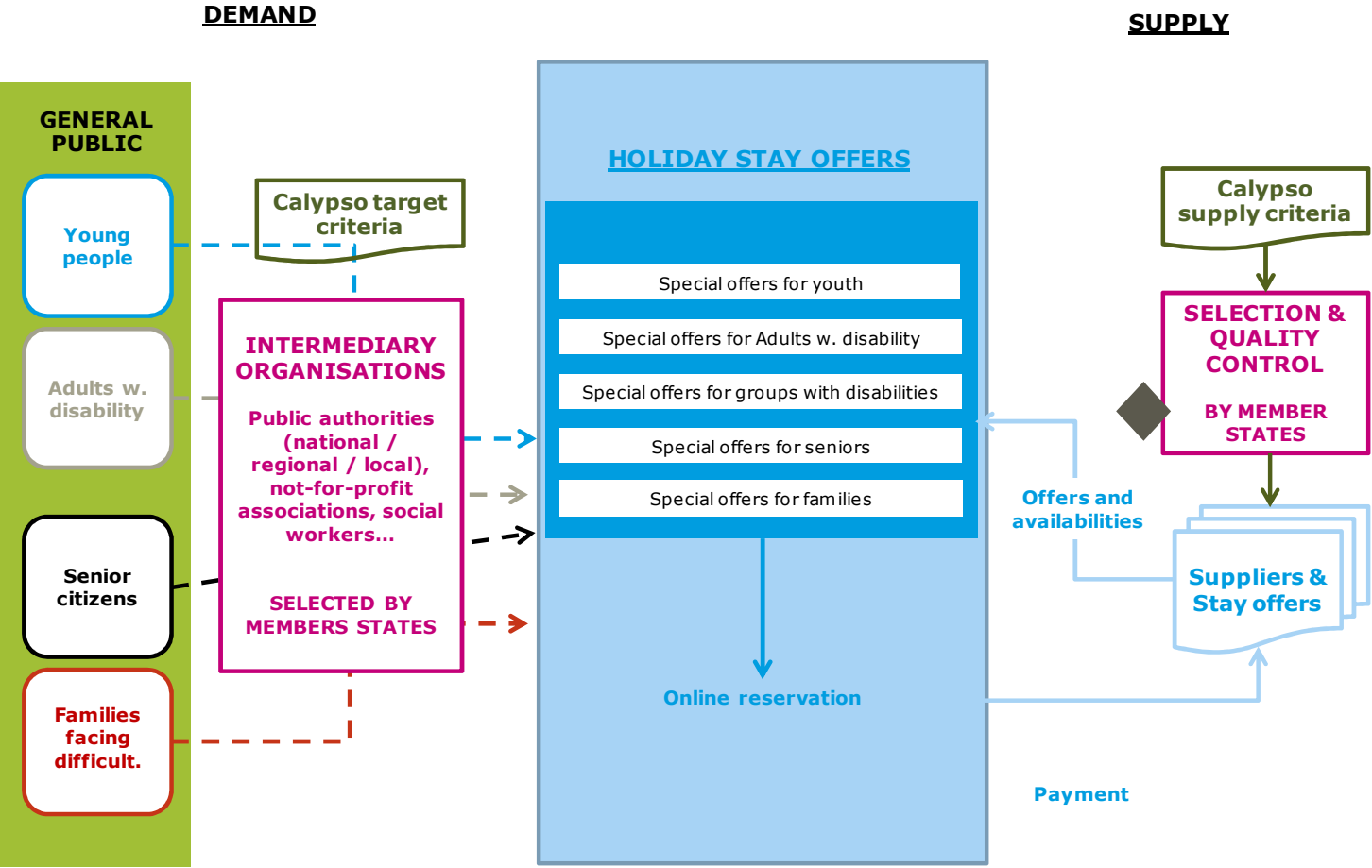
7.3   Benchlearning study

Some examples of similar tools already in use or under development were identified in Task 2. The most relevant websites for Calypso are presented in short here. A more thorough description can be found in Annex D.

- **Bourse Solidarité Vacances (BSV)**[59]
  BSV is a French programme run by ANCV (Agence Nationale pour les Chèques Vacances): an online service of 'solidarity supplies' for booking of transportation, stays and leisure activities. The beneficiaries of BSV are individuals or families excluded from holidays and leisure activities, mainly because of economic or social difficulties.
  ANCV has implemented partnerships with:
    - A network of 275 intermediary organisations: local/regional administrations, charitable organisations, organisations for the unemployed, social centres, etc., which support holiday departure as part of their social or associative project. These organisations act as intermediaries between BSV and the targets by making a selection of the possible beneficiaries, proposing BSV products to them, and being responsible for the preparation of the stays.
    - Tourism suppliers: Accor, Comités d'action et entraide sociale, Cap France, comités d'entreprises, Center Parcs, Ethic Etapes, Eurodisney, Fédération des œuvres laïques, Odalys, LVT, Relaisoleil, UCPA, ULVF, Vacanciel, VVF, etc.
  The research of a stay is made online through a set of criteria, such as type of stay, period, location, etc. The intermediary books the stay online and then sends the documents proving the income of the beneficiaries of the stay. The ANCV checks the eligibility of the beneficiaries and activates the booking. The ANCV is the only contact for the suppliers. Booking of transportation, stays and leisure activities online are directly made by the ANCV. Afterwards, the project holder receives the final documents on his booking directly from the supplier, which will be given to the beneficiaries.

- **Holidays For All**
  This website was designed by the BITS (International Bureau of Social Tourism) to be adapted to everyone's specific needs - young people, families, seniors, and people with limited physical mobility - and at reasonable prices.

  The web portal is open and accessible to any internet user. The suppliers must be members of BITS to be on the portal. As for the criteria for quality standards, BITS refers to and accepts respective quality standards existing in the different countries. In the future, BITS could proceed to the creation of its own quality label, where certain minimum criteria are employed and which the accommodation suppliers should adopt. So far, 105 accommodation centres are online, and 90 more should be added in the near future (work in progress), mainly youth hostels, camping, youth holiday centres, bed & breakfasts, and family holiday villages.

  The research combines several criteria: name, country, region, city, type of accommodation, type of stay, themes, and type of clientele.
  BITS has planned to submit a proposal to the Commission Tourism Unit in order to develop the Holidays for All website within the Calypso framework.

- **ANCV's proposal of European web portal for youth**
  This proposal was submitted to the Commission Tourism Unit by ANCV (Agence nationale pour les Chèques Vacances) and UNAT (Union nationale des associations de tourisme et de plein air). The proposal is a European platform displaying "low-cost stays for young people". The Youth Portal has two objectives:
    - To offer all young people between 18 and 30 dedicated discounts offered by tourism suppliers. The goal is to allow the maximum number of people to go on holiday. The priority is given to young 'independent' people are already used to taking holidays.

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[59] See Annex A – *Compendium of good practises*, 1.5.2.

- To be the basis of national financial support mechanisms in order to reduce the travel costs of some beneficiaries. The goal is to support those who cannot go on holiday mainly for financial reasons.

The website would be developed like a portal with links to booking websites of tourism suppliers who would be partners of the project and would offer discounted holiday stays.

The proposed mechanism implies partnerships with national/local social organisations able to identify and support the underprivileged young people in each participating country. These stakeholders send the portal lists of young people eligible to national/local support. The portal merges the data so as to immediately have the information related to each beneficiary.

If the young person benefits from national or local support, he/she has to identify him/herself with a code (sent beforehand by the stakeholder in charge of the national/local support). This code allows the person to receive an additional discount on the holiday offer. The stakeholder in charge of the national/local support directly pays the supplier the amount corresponding to this additional discount.

- **Malta Social Tourism National Project**[60]
  This project is based on the idea of a common portal, where tourism service providers offer their services to the users of the portal for a lower price.

  It is targeted at all members of the participating unions and organisations. The goal of the organisers is that by conducting negotiations with representatives of four target groups, it will be possible to offer, in the social tourism portal, services specifically directed at the different target groups.

  Now in the beginning phase, the offers available are given by Maltese tourism providers, such as hotels and transport. The goal is that at a later phase, the portal will also include offers from service providers outside of Malta so that outbound travel from Malta will be covered.

  As the project's starting point was to provide social tourism services for the members of the trade unions, only unionised hotels were allowed to provide their offers in the portal in the beginning phase. This led to even higher prices than in the national market. Now more than 30 hotels have joined the portal and are, according to the organiser, competing to be a part of the portal.

- **European Youth Card EURO<26**
  The EURO<26 is a discount card run by European Youth Card Association (EYCA). It represents 62 youth card organisations in 41 European countries, issuing cards to over 4.3 million young people aged under either 26 or 30 depending on the national organisation.

  The website provides information on the 100,000 discounts offered in 38 countries in different fields: culture, transport, travel, shops and services. The search engine uses several filters: by country, region, city, type of product. The information is provided for each supplier: name, contact, amount of the discount.

- **Eurodesk**
  Eurodesk is a non-profit-making International Association (Youth in Action Programme), providing information and advice concerning Europe to young people and those who work with them.

  The Eurodesk web site is an information portal with global information on youth policy, EU opportunities, information and links to other European stakeholders and programmes involved in youth programme, a discussion forum etc.

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[60] See Annex A – *Compendium of good practises*, 1.5.6.

- **Europeforall**
  The website Europeforall was developed by the OSSATE project (EU funded) to provide accessibility information about tourist venues in seven countries: Austria, Belgium, Denmark, Greece, Norway, Sweden and the United Kingdom.

  The main function of Europeforall.com is to help travellers who need accessibility information to plan their holiday or business trip more easily and with confidence. The search is made by destination. The following information is provided for each venue: brief description, contact information, pictures when available, and venue assessment level.

  This portal is not yet efficient and most of the venues have incomplete assessment or self-assessment, which questions the reliability of the information.

- **DisabledGo**
  This is the United Kingdom's premier provider of personally-surveyed access information and details over 70,000 venues. Working directly with public and private sector partners across the United Kingdom, DisabledGo researches and inspects all kinds of venues, awards symbols depending on the kind of accessibility, and produces access guides to public venues.

  The research online is made by destination rather than by kind of venue (accommodation, attractions and travel). For each venue, symbols indicate the kind of disability taken into account. Descriptions of venues include pictures, accessibility information, links to websites and customers reviews.

8.   TASK 5: SURVEY OF NON-PARTICIPATING COUNTRIES

The purpose of Task 5 is to explore the reasons for non-participation of nine Member States/Candidate Countries in the Calypso preparatory action, and to assess whether they could be interested in participating from subsequent stages of the Preparatory Action.

In order to achieve the above, the consortium conducted telephone interviews with representatives of Denmark, Estonia, Finland, FYROM, Germany, Luxembourg, Netherlands, Sweden and United Kingdom.

8.1   Main findings

The feed-back from the interviews is coherent for Estonia, Finland, FYROM, Netherlands, Sweden and United Kingdom. The interviewed countries are not in principle opposed to participating in the Calypso preparatory action.

The Calypso approach based on the four target groups is globally in line with the Estonian, Finnish, Macedonian and Dutch vision of 'social tourism'.[61] This approach is not relevant for Sweden, where an inclusive vision of "tourism for all" is preferred. This would however not be a barrier to participate in Calypso, since the target groups could be studied from a business perspective, highlighting the growth potential of each of these four consumer groups for the Swedish tourism industry.

These countries also consider the economic approach and the focus on off-seasonality to be relevant. However, in Finland Calypso is not considered as a relevant answer to the seasonality constraints.

The lack of human and financial resources is the main reason for the decision of these countries to not take part in Calypso preparatory action.
Calypso was not considered as a priority dossier, and the resources available at governmental level did not allow participation.

In that sense, a support from the Commission to strengthen the structures in charge of tourism in these countries would be helpful for them to participate in the next steps.

Joining the next steps of Calypso is a possible option for each of these countries. This decision would depend on:
- The concrete objectives and content of the next steps.
- The expected outputs for the national tourism industries.
- The level of involvement expected from the Member States in terms of human and financial resources.

Luxembourg and Germany have different views.
The main reason for the non-participation of Germany in Calypso is the differing understanding of the concept "social tourism". Calypso is thus not seen to be in line with the German vision of social tourism. Germany is not planning to participate in the following phases of Calypso, at least not on the national level. Luxembourg is not interested in social tourism and the Calypso global approach.

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[61] Regardless of what definition is used on thenational level.

8.2   Summary of the interviews

8.2.1 Denmark
The person in charge of the dossier for VisitDenmark when Denmark decided not to participate in Calypso preparatory action has left her function, and nobody in the organisation seems to be able to explain that decision.

The Ministry of Economic and Business Affairs is now in charge of the dossier.

8.2.2 Estonia
No actions specifically intended for the four groups targeted by Calypso exist in the tourism field in Estonia. The term "social tourism" is not used and does not have any connotation.

The existing support given to the four target groups through social welfare is generally in cash, and the beneficiaries decide on their own how to spend the money for travelling or for something else.

As far as accessibility is concerned, Estonia is working on a "universal design", mainly through building laws and regulations, so as to help the administrations and the private sector adapt all of the infrastructures to welcome the people with disabilities. No actions are specifically directed at travel or tourism.

In principle, there is no opposition to participate in the Calypso preparatory action. The Calypso economic approach is relevant to Estonia, especially considering that the seasonality is a major stake for Estonian tourism industry.

The lack of human and financial resources is the reason why Estonia decided not to participate. This decision was not discussed at governmental level.

Estonia could possibly take part in the next steps of the preparatory action in 2011. This possibility should be discussed between the Ministry of Economic Affairs and the Ministry of Social Affairs, which may have some more resources to dedicate to Calypso. The local level should be associated in the discussions, as some municipalities (in the bigger cities) have their own social support schemes, targeting mainly the seniors, the disadvantaged families and the people with disabilities.

8.2.3 Finland
Social tourism is not a field of public intervention in Finland, neither at the national nor at the regional level. The term "social tourism" could be known but it does not have a clear definition. It means more or less holidays of low income families (especially workers). Some support is given to families facing social difficulties and where the parents are workers. They are called "financially supported holidays". No actions are conducted towards the other target groups considered by Calypso.

The Ministry of Employment and the Economy is responsible for incoming and domestic tourism development in Finland. It is also responsible for the coordination of tourism policy. The interviewees consider the **Calypso preparatory action to be interesting, but** it has not been possible for the Ministry to identify an actor to take **charge of "social tourism" in Finland or to become the contact point for Calypso.**

Besides, the Calypso approach is not fully in line with the Finnish vision. While Finland agrees with the four target groups, according to the respondents the focus on off-season is not relevant because those target groups want to travel like the others in high season, especially families who have children at school.
Finland would like to have more travellers in low season, but they do not believe that Calypso's approach is the right way to do it.

Finland could possibly join in on the condition that a Calypso contact person can be identified. The private sector has also shown some interest in the development of supported holidays.

8.2.4 FYROM

According to the interviewee, FYROM is interested in future participation in the Calypso preparatory action. The non- participation has been caused by lack of resources.

So far, public intervention in the social tourism field is limited to three recent initiatives of the Government targeting the senior citizens, i.e. pensioners without any conditions of income:
- Stays in spas free of charge: the Government finances the accommodation (hotels in the spa resorts) and the spa treatment programme. About 20,000 beneficiaries have already participated.
- Subsidies to support travel agencies doing inbound tourism: depending on the transportation, €10-15 per person travelling by bus, €25-45 per person travelling by charter flight.
- Free transportation by bus for week-ends around Skopje.

8.2.5 Germany

In Germany, the term "social tourism" is understood in different ways by different actors. In general terms, it can be said that social tourism is mainly understood as holidays and recreational stays for people with social difficulties. Examples of social tourism include holiday stays (*Kur*) for mothers and their children the granting of holiday money, support for family and youth tourism, as well as barrier free tourism. Supporting tourism is the task of the German Länder, while support for youth and families is mainly the task of municipalities and cities. An important part of supported youth and family tourism is organised by independent actors, while the funding comes from public finances.

With respect to families facing difficult social circumstances, the Federal Ministry for Family, Seniors, Women and Youth has for the last 50 years supported the construction of family holiday centres in Germany. These centres direct their services toward large families, single parents, families with a family member with a disability, and families with low income who have difficulties in finding mainstream tourism products suitable to their needs. Moreover, families with low income receive financial support in 13 Länder for holidays in family holiday centres, youth hostels or farms.

The main reason for the non-participation of Germany in Calypso is the differing understanding of the concept "social tourism", and Calypso is thus **not seen to be in line with the German vision** of social tourism. **Germany is not planning to participate** in the following phases of Calypso, at least not on the national level.

8.2.6 Luxembourg

There is no social tourism in Luxembourg. The term "social tourism" is in itself well understood but not applicable to the country.

The Ministry of Tourism is working exclusively on incoming tourism (of foreign tourists in Luxembourg). There is no public support to the existing tourism programmes for youth or seniors.

Besides, Luxembourg has very high price levels, making tourism expensive. There is no "cheap tourism" in the country. The Luxembourg capital city represents 50 to 55% of the national tourism, almost exclusively with MICE tourism. The other 45 to 50% are mainly short stays from neighbouring countries (Netherlands, Belgium, France, and Germany).

For these reasons, the political decision to not participate in the Calypso preparatory action was clear and quite obvious. Luxembourg does not feel concerned at all with this matter.

8.2.7 The Netherlands

In Netherlands, social tourism is not a field of public intervention at national level or a specific subject for policy. The term itself is not used (and thus has no specific connotation). Tourism is very much related to the economic policy and is business-oriented, with the main goal being the creation of employment. The tourism unit is very small (one full-time equivalent) and is focussed on marketing, promotion of the destination and actions to stimulate inbound tourism.

Nevertheless, if the Dutch tourism business associations turn out to be interested in the actions that will be implemented in the following steps of the preparatory action, the Netherlands Tourism unit may change their view and participate in Calypso.

Social tourism isn't a field of public intervention at regional level. The interviewees confirmed that the provinces are not interested in participating in Calypso.

8.2.8 Sweden

In Sweden, the term "social tourism" does not have a clear meaning and it has a negative connotation[62]. The appropriate term to use is "tourism for all". This is an inclusive term that Swedes are comfortable with because it does not put forward or stigmatise any specific group.

Sweden is very much focussed on the tourism for all approach and design for all. Some actions are undertaken at national, regional and local levels to promote this approach and raise awareness amongst the tourism industry, showing that tourism for all is also a way to strengthen the business. These actions are however definitely mainstream oriented and not focussed on any type of target group.

The commitment from the public authorities is rather limited. The policy is clear (objective of full accessibility by 2010) and the administration supports the tourism for all approach. Nevertheless, very little financial means are dedicated to the issue, and the competencies are spread between different authorities. This makes the actions quite difficult the coordinate.

Therefore, the Calypso approach with its four target groups is not relevant in the Swedish context. However, if Sweden decided to participate in the next steps of the preparatory action, the four targets could be studied from a business perspective, highlighting the growth potential of each of these four consumer groups for the Swedish tourism industry.

Little resources are dedicated to tourism at the governmental level. Within the Division for Research, Innovation and Business Development, only one full-time equivalent is working on tourism, with two main goals: promotion and business development, i.e. activities to promote the tourism industry (in particular actions on transport, infrastructure and environmental issues). Within the agency responsible for business development, four people are working on tourism. At the national level, Visit Sweden is a main player (with the main budget for tourism). This national agency is dedicated to the marketing and promotion of the destination.

At regional and local levels, many public bodies are dealing with tourism, but only with promotion.

In this context, the awareness of the issues discussed in the framework of Calypso is low. These issues are not a priority for the Division for Research, Innovation and Business Development, thus the involvement with Calypso depends to a high extent on the personal motivation and interest of the person in charge. The interviewees are in principle **not opposed to participating in the next steps of the preparatory action.**

The lack of human and financial resources would be the main barrier. If Sweden was to participate in the next steps, there would probably be hardly any public budget at national or

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[62] The term was actually used by some politicians during the election campaign for the referendum about the Euro in 2003, to refer to the immigrants from Eastern European countries that might come in Sweden so as to benefit from jobs and the welfare system..

regional levels to implement Calypso actions. As the main player in the field, Turism för Alla (tourism for all) association could be the Government's representative for Calypso.

Turism för Alla is a not-for-profit organisation, member of ENAT (European Network for Accessible Tourism) and also the Swedish contact point for CETA project.[63] Turism för Alla has several activities: work as consultants for the tourism industry and public administrations, provide information on accessibility (database on Internet, printed guide), provide services for individuals (shape packages for specific needs), and organise training. The interviews show that Turism för Alla has an interest in the Calypso preparatory action. They also have the capacity and knowledge to actively participate, as well as the possibility to communicate easily with the relevant administrations. The NGO does not have the financial means needed and would ask to have at least the cost for participation to Calypso covered by the Government or the Commission.

8.2.9 United Kingdom

The United Kingdom would like to review both the findings of the pilot stage and the objectives and possible future actions before considering further involvement.

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[63] Competitiveness for European Tourism for All: to focus and extend ENAT's SME activities by promoting tourism accessibility as an enabler of economic, social and environmental sustainability:
http://www.accessibletourism.org/?i=enat.en.enat_projects_and_good_practices.566.

CALYPSO STUDY
ANNEXES

**CALYPSO STUDY
ANNEXES**

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ANNEX B
COUNTRY STUDIES

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ANNEX C1: DIMENSIONS OF DISABILITIES[1]

Table 1: Dimensions of disabilities[2]

Type of impairment	Description	Difficulties in one of more of the following areas:
Mobility impairments	Varying levels of physical mobility restrictions, affecting legs, feet, back, neck, arms or hands	- physical and motor tasks - independent movements - performing basic life functions
Sensory impairments	Capacity to see is limited or absent Completely deaf or are hard of hearing	- reduced performance in tasks requiring clear vision - difficulties with written communication - difficulties with understanding information presented visually - reduced performance in tasks requiring sharp hearing - difficulties with oral communication - difficulties in understanding auditorally-presented information
Communication Impairments	Limited, impaired, or delayed capacities to use expressive and/or receptive language	- general speech capabilities, such as articulation - problems with conveying, understanding, or using spoken, written, or symbolic language
Intellectual/ mental impairments	Lifelong illnesses with multiple aetiologies that result in a behavioural disorder	- slower rate of learning - disorganised patterns of learning - difficulties with adaptive behaviour - difficulties understanding abstract concepts - limited control of cognitive functioning - problems with sensory, motor and speech skills - restricted basic life functions
Hidden impairments	Variety of illnesses	- heart problems - blood pressure or circulation problems - breathing difficulties - problems with stomach, liver or kidneys - problems to control the level of sugar in the blood (diabetes) - disorder of the central nervous systems (epilepsy)

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[1] Source: 'Accessibility market and stakeholder analysis – one-stop-shop for accessible tourism in Europe', Buhalis, D., V., Eichhorn, E. Michopoulou, G. Miller, University of Surrey, United Kingdom, October 2005

[2] Source: DEO, 2005.

ANNEX C2: MARKET SIZE ESTIMATIONS[3]

Table 2: Estimations of prevalence of disability in Europe

Estimation (total number)	% of population	Sources/ references
About 45 million (working age population/ aged 16 to 64) in 25 European countries	15.7%	➤ Dupré & Karjalainen published in Eurostat (2003)
45 to 90 million in Europe having at least one type of impairment	10% to 20%	➤ Toerisme Vlaanderen (2001) ➤ National Disability Authority (2003) (Ireland)
50 million in the enlarged European Union	Approx. 11%	➤ European Disability Forum, 2005 ➤ Gerlin, 2005 ➤ Qualitas, 2004 ➤ Brown, 1991 ➤ van Horn, 2002 ➤ Horgan-Jones & Ringaert, 2004
69 to 92 million in the European Union	15% to 20%	➤ Pühretmair, 2004
60 to 80 million disabled/ people with reduced mobility	13% to 17%	➤ Community Research and Development Information Service CORDIS (1995)
92 to 115 million in the EU	20% to 25%	➤ Stumbo & Pegg (2005)

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[3] Source: 'Accessibility market and stakeholder analysis – one-stop-shop for accessible tourism in Europe', Buhalis, D., V., Eichhorn, E. Michopoulou, G. Miller, University of Surrey, United Kingdom, October 2005.

Table 3: Market size per country and market segment (27 European countries)

Country	Market segments (numbers given in thousands)								TOTAL demand for accessibility per country (in thousands)
	Mobility impaired	Visual impaired	People with deafness/ hard of hearing	Speech impaired	Mental/ intellectual impaired	People with hidden impair-ments	Total disability population incl. long-standing health problems (age: 16-64)	Elderly population (> 65)	
Austria	353.6	23.4	17.8	5.0	36.9	271.9	708.6	1,357.0	2,065.6
Belgium	536.3	60.1	18.8	8.8	91.5	537.5	1,253.0	1,807.0	3,060.0
Cyprus	24.1	2.2	0.7	*0	6.5	*29.3	62.8	89.0	151.8
Czech Rep.	529.2	91.1	17.6	5.9	58.8	*765.9	1,468.5	1,458.0	2,926.5
Denmark	321.0	15.0	12.9	*2.9	64.4	298.2	714.4	817.0	1,531.4
Estonia	77.3	14.8	*0	*0	11.6	*98.4	202.1	224.0	426.1
Finland	362.7	15.7	11.2	*0	59.5	657.0	1,106.1	831.0	1,937.1
France	3,764.0	943.4	252.9	48.6	885.1	3,832.0	9,726.0	9,962.0	19,688.0
Germany	**1,124.4	**109.5	**136.6	**4.3	**731.5	**1,373.8	***6,161.0	15,577.0	21,738.0
Greece	166.6	38.2	7.3	*4.4	67.2	449.2	732.9	2,007.0	2,739.9
Hungary	242.4	14.1	7.8	*3.1	107.1	*406.6	781.1	1,507.0	2,288.1
Ireland	81.9	5.1	6.0	*0	31.4	*172.2	296.6	636.0	932.6
Italy	981.5	89.5	43.5	17.9	263.3	1,155.3	2,551.0	11,289.0	13,840.0
Latvia	*0	*0	*0	*0	*0	*0	*0	370.0	370.0
Lithuania	*39.9	*0	*0	*0	30.2	*119.4	189.5	546.0	735.5
Luxembourg	19.4	2.1	*0	*0	*1.4	*12.1	35.0	68.0	103.0
Malta	*8.4	*0	*0	*0	*3.1	*8.5	20.0	54.0	74.0
Netherlands	1,284.5	56.5	53.6	14.1	285.1	1,019.1	2,712.9	2,313.0	5,025.9
Norway	238.1	18.3	16.8	*1.5	52.0	*115.3	442.0	681.0	1,123.0
Poland	*0	*0	*0	*0	*0	*0	*0	5,094.0	5,094.0
Portugal	546.7	77.5	19.7	*0	183.2	573.5	1,400.6	1,802.0	3,202.6
Romania	202.7	26.1	9.0	8.1	92.8	563.1	901.8	3,255.0	4,156.8
Slovakia	125.5	8.2	4.8	*0	29.5	145.5	313.5	643.0	956.5
Slovenia	117.4	9.4	*3.3	*0	14.7	*132.1	276.9	309.0	585.9
Spain	932.9	83.5	40.6	11.9	365.1	952.0	2,386.0	7,103.0	9,489.0
Sweden	500.9	21.1	42.2	*0	96.2	507.9	1,168.3	1,568.0	2,736.3
UK	3,486.7	185.8	262.3	109.3	950.9	5,989.6	10,984.6	9,536.0	20,520.6
Total demand for accessibility per type	16,068.1	1,910.6	985.4	245.8	4,519.0	20,185.4	***46,594.2	80,903.0	127,498.2

* Unreliable or uncertain data
** The data given for Germany only refer to severe impairments and does not take into account mild to modest impairments. Also hidden impairments only refer to the most severe types of long-standing health problems. It is therefore expected that numbers for Germany are higher than stated.
*** Estimations for German disabled population including mild, moderate and severe impairments, using estimation by Eurostat (2003), see table 6

Source: Eurostat, 2005; Statistisches Bundesamt, 2003a; U.S. Census Bureau, 2005

Figure 1: Occurrence of LSHPD in Europe (population: 16-64)[4]
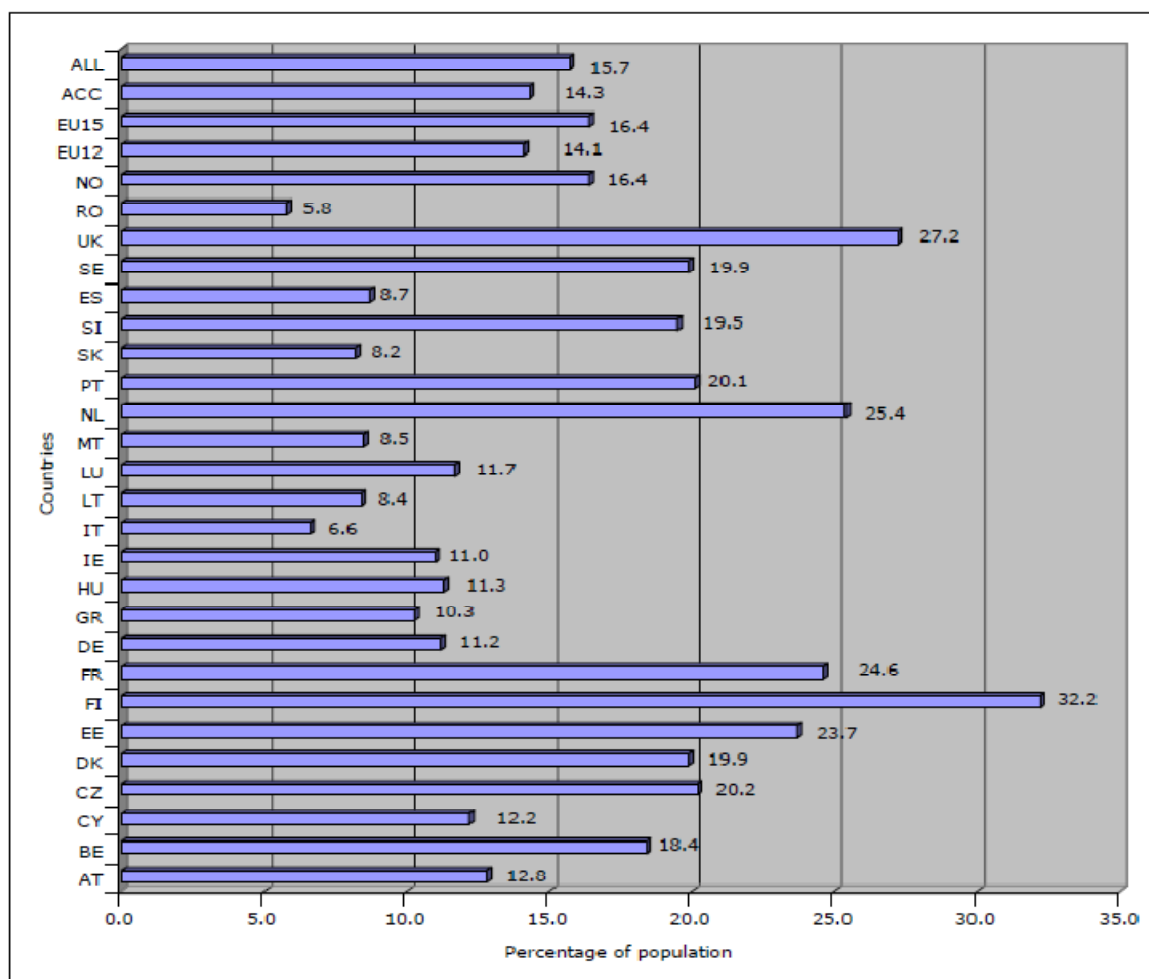
Country codes and codes for geographical aggregates:

BE = Belgium, **DK** = Denmark, **DE** = Germany, **GR** = Greece, **ES** = Spain, **FR** = France, **IE** = Ireland, **IT** = Italy, **LU** = Luxembourg, **NL** = Netherlands, **PT** = Portugal, **AT** = Austria, **FI** = Finland, **SE** = Sweden, **UK** = United Kingdom, **EU 15** = European Union, **EU 12** = Eurozone, **CZ** = Czech Republic, **EE** = Estonia, **CY** = Cyprus, **LT** = Lithuania, **HU** = Hungary, **MT** = Malta, **SI** = Slovenia, **SK** = Slovak Republic, **ACC** = Acceding Countries, **NO** = Norway, **RO** = Romania, **All** = EU 15, ACC, NO + RO)

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[4] Source: Eurostat.

Table 4: Summary of the 21 Calypso countries

Country	Persons /Impairments taken into account	Global figure
Austria	Disabled population (1997)	1,035,800 people 13% of the population
Belgium	Population between 16 and 64 suffering from long-term illnesses or disabilities (only Flanders)	1 million people 16% of the Flemish population
Bulgaria	Disabled people (National Statistical Institute)	450,000 people 6.2% of the population
Croatia	Disabled adults citizens	418,400 people 10.7% of the population
Cyprus	Disabled citizens (2002)	95,000 people 12% of the population
Czech Republic	Civilization diseases, physical, mental, visual and hearing impairment (2008)	1 million people 9.7% of the population
France	People living with disability problems: partially sighted persons, hard-hearing persons, people with a physical handicap and with a mental handicap (2004)	5.7 million people 9.1% of the population
Greece	Population with health problem or disability (National Statistical Service of Greece, Labour Force Survey, 2002)	1,996,300 people 18.2% of the population
Hungary	Disabled persons	600,000 people 6.0% of the population
Ireland	People with some form of disability	400,000 people 10% of the population[5]
Italy	-	-
Latvia	Persons receiving disability pension (2008)	67,400 people 3% of the population
Lithuania	People over 18 with movement/physical disability, with mental/intellectual disability, blind people, deaf people, other disabilities (2008)	243,000 people 7.2% of the population
Malta	People receiving disability pension (2008)	10,226 people 2.4% of the population
Poland	Adult disabled people (2008)	5.3 million 13.7% of the population
Portugal	People with sorts of disabilities (2007)	636,000 people 6.0% of the population
Romania	Disabled adults (2009)	595,300 people 2.6% of the population
Slovakia	Population with 'long standing health problems': physical impairment (arms or hands, legs or feet, back or neck problems), visual impairment, hearing impairment, speech impediment, skin disease, respiratory disease, heart and blood pressure disease, alimentary tract disease, diabetes, epilepsy, mental disorders, other progressive illness and other long standing health problems (2007)	442,000 people 8.2% of the population
Slovenia	People with intellectual disabilities, people with accidental head injury, people with motion disability (paraplegics, tetraplegics, people with multiple sclerosis), deaf and hard of hearing, blind and visually impaired, students with disabilities and the disabled veterans	162,000 people 8.0% of the population
Spain	Persons with a disability aged between 18 and 60	4 million people 10% of the population
Turkey	Orthopaedic, seeing, hearing, speaking and mental disability and disease (2002)	8.4 million people 12.3% of the population

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[5] Source: People with Disabilities in Ireland, http://www.pwdi.ie/about_pwdi/index.htm.

ANNEX C3: OUTPUTS ON GOOD PRACTICES FOR ADULTS WITH DISABILITIES

Country	Name	Type of stakeholder	Needs taken into account	Transferability to Calypso level
Austria	Holidays on farms: specific quality criteria applied for farms providing services to persons with disabilities	Association	Building accessibility	This label could be a basis for the countries offering or developing rural tourism, but with no specific interest for Calypso level
Czech Republic	'Beskydy for all': barrier free travelling for people with disabilities	Private	Physical accessibility and information	This practice is an interesting experience for access to information on accessibility, but is not an exchange mechanism
France	Seniors en Vacances	Public	The services correspond to specific needs of seniors, including comfort of facilities and proximity of a health centre, plus preparation of holidays	This practice stresses the point that tourism structures should be adapted to needs of people with problems of mobility, but is not an exchange mechanism.
France	Aides aux projets vacances	Public	Financial support for the person with a disability and accompanying person	This practice is not an exchange mechanism, and with support being given to charitable organisations, it is hardly transferable to the Calypso level

ANNEX C4: EVALUATION OF ACCESSIBLE TOURISM SUPPLY[6]

Table 5: Total and Accessible Tourism Supply

	Accommodation (number of establishments)			Attractions			Restaurants & Catering Facilities		
	Total	Accessible	(%)	Total	Accessible	(%)	Total	Accessible	(%)
AUSTRIA	20609	295	1.4	-	-	-	-	-	-
BELGIUM	3558	175	4.9	1233	79	6.4	-	-	-
CYPRUS	961	39	4	-	-	-	-	-	-
CZECH REPUBLIC	3859	660	17.1	120	9	7.5	245	109	44.4
DENMARK	1097	130	11.8	-	-	-	1217	86	7.6
ESTONIA	854	-	-	422	-	-	100	-	-
FINLAND	1470	23	1.5	-	93	-	-	101	-
FRANCE	28649	368	1.2	-	196	-	-	100	-
GERMANY	55119	-	-	-	-	-	-	-	-
GREECE	8876	1094	12.3	-	-	-	-	120	-
HYNGARY	2741	330	12	-	-	-	-	-	-
IRELAND	8971	75	0.8	-	83	-	-	-	-
ITALY	31997	9248	28.9	-	-	-	-	-	-
LATVIA	326	-	-	-	-	-	-	-	-
LITHUANIA	1221	122	9.9	-	-	-	1254	103	8.2
LUXEMBOURG	560	42	7.5	-	-	-	257	0	-
MALTA	361	23	6.3	46	-	-	928	1	0.1
NETHERLANDS	7080	196	2.7	1425	427	29.9	110	36	32.7
POLAND	8376	-	-	-	-	-	-	-	-
PORTUGAL	2214	-	-	-	-	-	2115	-	-
SLOVAKIA	2084	235	11.2	-	-	-	275	64	23.2
SLOVENIA	981	-	-	-	-	-	793	-	-
SPAIN	22348	1525	6.8	-	-	-	41789	45	-
SWEDEN	2770	250	9	-	-	-	-	-	-
UK	62828	938	1.4	7806	-	-	-	-	-
SUM	279910	15768	5.6	11052	1258	11.3	49083	765	1.5

[6] Source: 'Accessibility market and stakeholder analysis – one-stop-shop for accessible tourism in Europe', Buhalis, D., V., Eichhorn, E. Michopoulou, G. Miller, University of Surrey, United Kingdom, October 2005

ANNEX C5: THE IMPACT OF DISABILITY ON HOLIDAY-TAKING

Figure 2: Impact of disability on holiday-taking (source: VisitBritain)[7]

ANNEX C6: PRESENTATION OF THE WALLOON REGION 'INDICE PASSE-PARTOUT'

1. QU'EST-CE QUE « l'INDICE PASSE-PARTOUT » (IPP) ?

L'Indice Passe-Partout est le résultat d'une évaluation de l'accessibilité d'un bâtiment ouvert au public. Il s'agit d'un dessin d'une clé sur laquelle apparaissent 6 pictogrammes. Sous chacun de ces pictogrammes est affichée une valeur pouvant varier entre 0 et 9.
Les 6 pictogrammes représentent 6 catégories de personnes à mobilité réduite.

Dans l'ordre d'apparition sur la clé, de gauche à droite, il s'agit :
1 – du chaisard seul
2 - du chaisard assisté
3 – de la personne marchant difficilement
4 – de la personne déficiente visuelle
5 – de la personne déficiente auditive
6 – de la personne avec difficultés de compréhension
Cela signifie que pour chacune de ces catégories, Gamah analyse le bâtiment et remet un indice variant de 0 à 9 selon le degré d'accessibilité de ce bâtiment. Plus l'indice est élevé, meilleure est l'accessibilité.

2. PRINCIPE GENERAL DE COTATION

Pour chacune des catégories de personnes à mobilité réduite, nous avons identifié une série de fonctions indispensables des bâtiments dont l'accessibilité doit être garantie.
Exemples : l'entrée, la circulation, le stationnement, la sécurité,…
Leur nombre et leur ordre de priorité varient selon le type de handicap (voir les fiches par type de handicap).
Pour chacune des catégories, le chiffre représente une fonction du bâtiment dont l'accessibilité est acquise. Cette fonction n'est signalée « accessible » que si la précédente l'est déjà.
Exemple : si vous lisez le chiffre 2 sous un pictogramme, cela signifie bien sûr que la fonction correspondant au chiffre 2 est accessible, mais également que la fonction correspondant au chiffre 1 l'est aussi. Si vous lisez un 4, cela signifie automatiquement que les fonctions correspondant aux chiffres 1, 2, 3 et 4 sont accessibles.
En bref,
Indice 2 = 1 + 2 accessibles
Indice 4 = 1 + 2 + 3 + 4 accessibles
Par contre, lorsque vous lisez, par exemple, le chiffre 4, cela signifie que la fonction correspondant au chiffre 5 n'est pas accessible. C'est ce que nous appelons le principe du 'maillon faible'. Lorsqu'un maillon de la chaîne des fonctions n'est pas accessible, cette chaîne s'arrête. Même si les fonctions correspondant aux chiffres 6, 7 et 8 sont accessibles, si la fonction 5 ne l'est pas, l'indice sera de 4. Nous avons mis ce principe en vigueur sur base du raisonnement suivant : rien ne sert d'avoir de bons équipements bien adaptés si je ne peux pas entrer dans le bâtiment.

3. A QUOI SERT L'INDICE PASSE-PARTOUT ?
Si vous êtes une personne à mobilité réduite :
l'IPP vous informe du niveau d'accessibilité du bâtiment de façon très précise et spécifiquement pour vous ! L'information que vous donne l'IPP est bien plus précise et ciblée que celle que vous donne le simple logo de la chaise roulante blanche sur fond bleu.
Si vous êtes propriétaire ou gestionnaire d'un bâtiment ouvert au public :
L'Indice Passe-Partout vous informe du niveau d'accessibilité que vos visiteurs rencontreront. De plus, si vous êtes soucieux du confort de vie de ceux-ci, l'IPP et son dossier vous montrent directement ce que vous devez modifier pour améliorer l'accessibilité de votre bâtiment et, par conséquent, son indice !
Avec 30% de la population considérés comme personnes à mobilité réduite, l'enjeu est de taille !

4. COMMENT REALISONS-NOUS UN INDICE PASSE-PARTOUT ?
Il s'agit d'un travail en cinq étapes.

Etape n°1. l'Arpentage
Une équipe de professionnels visite les lieux, observe et mesure une série d'éléments formant le parcours logique de la personne qui se rend dans le bâtiment. L'équipe rencontre aussi le gestionnaire pour en savoir plus sur la disponibilité, les comportements et la compétence du personnel. Des fiches de relevé et une série de photos balisent systématiquement ce travail. Elles sont remises à l'Analyste.

Etape n°2. l'Analyse
L'Analyste décode le relevé de l'arpenteur selon la méthodologie stricte et rigoureuse que nous avons créée. Ceci détermine une combinaison de chiffres que l'on retrouve dans la clef de l'IPP. Chaque chiffre est le témoin du niveau d'accessibilité pour chaque personne à mobilité réduite. Il dévoile également les exigences qui n'ont pas été atteintes. L'analyste rédige un dossier qui argumente les chiffres de la clef.
D'où viennent les critères qui nous permettent de donner un indice à un bâtiment ?
Il s'agit d'une collecte d'informations commencée il y a 25 ans lorsque que Gamah a été créée. Cette expérience a été renforcée par l'apport du bureau d'études Plain-Pied (bureau d'études spécialisé en accessibilité). Enfin, les principales associations représentatives des personnes à mobilité réduite ont examiné ces critères, les ont amendés lorsque cela leur semblait nécessaire et les ont validés.

Etape n°3. la Validation
Lorsque l'IPP est établi et le dossier rédigé, le tout est envoyé au propriétaire ou gestionnaire du bâtiment évalué afin d'obtenir dans les 30 jours son avis. Celui-ci peut, en retour, faire état d'objections éventuelles, lesquelles seront intégrées au dossier si elles sont pertinentes. En cas d'absence de réaction, l'accord implicite est supposé acquis et le dossier prêt à être publié sur le site Internet.

Etape n°4. la Publication
La Publication réside dans l'envoi au gestionnaire du rapport final et d'un autocollant IPP individualisé. On lui recommande l'affichage de cet autocollant, sur la porte d'entrée ou à proximité immédiate. Parallèlement l'IPP du bâtiment est diffusé sur le site Internet www.ipponline.org, assorti du dossier d'analyse complet. L'IPP peut apparaître aussi dans différents guides ou brochures spécifiques reprenant des listes de bâtiments ouverts au public. L'IPP n'est pas figé ; il peut évoluer. Son évolution requiert un suivi.

Etape n°5. le Suivi
Le Suivi a une double origine. Soit le gestionnaire avertit le GAMAH des modifications susceptibles de changer l'IPP de son établissement. Soit les remarques émanent des utilisateurs du lieu ou des associations de personnes handicapées qui ont fait l'expérience d'accéder au bâtiment. Ceci donne lieu à d'éventuels aménagements et à une éventuelle réévaluation de l'IPP. Et une équipe d'arpenteurs se rend sur place…

5. OU TROUVER TOUTES CES INFORMATIONS (les IPP et leur dossier respectif) ?
1 - Sur notre site internet www.ipp-online.org :
Sur notre site, vous trouverez tous les bâtiments que nous avons évalués, les IPP que nous leur avons attribués ainsi que les dossiers explicatifs. (version complète ou résumée pour l'essentiel de l'analyse)

2 – A l'entrée des bâtiments que nous avons évalués :
Certains propriétaires ou gestionnaires de bâtiments ouverts au public affichent ouvertement le logo de l'IPP avec les valeurs que nous lui avons attribuées.

3 – Dans certains guides touristiques :
Ceux-ci publient les IPP des bâtiments dont ils parlent.
Exemple : le catalogue des Journées du Patrimoine ou le guide des gîtes de Wallonie

ANNEX C7: EUROPEFORALL VENUE ASSESSMENTS

The main function of Europeforall.com is to help travellers who need accessibility information to plan their holiday or business trip more easily and with confidence. The EfA database contains the results of individual assessments of venue accessibility based on standard questions and checklists. The check-points have been carefully selected by user representatives and experts to provide essential accessibility information for people with all types of accessibility requirements.

What is 'Venue Assessment Level'? Every EfA venue is assigned a Venue Assessment Level as follows:

- **No Level – Incomplete Assessment :**

No Level – Incomplete assessment is the lowest level of accessibility assessment. It means EITHER that no accessibility information is available OR that answers to some 'self-assessed' questions may be missing. For example, a venue owner may not have completed the "measurements" section of the EfA self-assessment questionnaire. The accessibility data which is displayed is, however, compliant with the EfA Level 1 assessment procedure.

- **Level 1 – Self-assessment**

Level 1 – Self-assessment provides an "entry-level" accessibility assessment procedure for those venue owners or managers who wish to register their establishment with Europeforall.com. The number and type of questions is fixed according to the venue type. Most questions have "closed" answers which require the venue owner or manager to select the appropriate response from two or more fixed alternatives. In some cases, the respondent may reply "not applicable". A few simple measurements are also required, such as the minimum width of a door opening.

- **Level 2 – Access Audit**

Level 2 – Access Audit is the EfA assessment procedure used by independent auditors on site visits. In this procedure all public areas of the venue or establishment are measured, described and assessed using appropriate checklists for each part of the venue. Level 2 audit questions cover a wider range of information than the self-assessments, and the checklists also include a greater number of measurements.

For Private Operators of multiple venues, as well as cities, regions or countries which do not currently operate an Accessible Tourism Information Scheme, EfA Level 2 provides a comprehensive approach with training procedures, accessibility checklists and database tools for establishing and managing such a scheme.

- **Level 3 – Proprietary Scheme**

Level 3 – Proprietary Scheme means that venue accessibility data has been gathered during an on-site audit by a third-party organisation with an agreement with EfA to display all or part of its information on the EfA site.

Level 3 audits may be carried out, for example, by hotel chains or by city, regional or national access schemes. A Level 3 Proprietary Scheme may contain more or less detailed information than is gathered by EfA Level 2 checklists. The Level 3 data supplier's name and a link to the independent on-line source data are provided where this is possible.

The current list of Level 3 proprietary suppliers to EfA are: Accescity, Belgium, Belgium Wallonia and Brussels, Accessible Flanders, Belgium Flanders and Danish Accessibility Label, Denmark.

ANNEX C8: WEB SITES INFORMATION ON ACCESSIBILITY

Handidays.com: exchanges of houses for people with disabilities	
Name of the expert conducting research	Carine Guidali/Marion Doublet
Country	France - Europe
Respondents/informants	Handidays.com Edouard de Joussineau, manager
Target group involved	Adults with a physical disability and their families
Description	Web portal dedicated to the free exchanges of housing adapted to persons with a physical disability in Europe. Spanish, German and English versions of the web portal are on-going. The portal is also a way to exchange information and advice on holidays and adapted equipment.
Handling of target group needs	Only housing adapted to physical impairments are proposed for exchanges, that is to say minimum size of the corridor, lift, reserved car park, etc.
Europeforall.com	
Name of the expert conducting research	Carine Guidali/Marion Doublet
Country **Target group involved**	Europe – 6 countries involved: Austria, Belgium, Denmark, Greece, Norway, Sweden and the United Kingdom All travellers who need accessibility information to plan their holiday
Description	The website www.Europeforall.com, developed in a European Commission funded project named OSSATE, provides accessibility information about tourist venues in 6 European countries. The website, which is available as a service for venue owners and data providers in Europe, is managed by EWORX S.A., Greece. The main function of Europeforall.com is to help travellers who need accessibility information to plan their holiday or business trip more easily and with confidence. The EfA database contains the results of individual assessments of venue accessibility based on standard questions and checklists. The search is made by destination. For each venue, the website gives a brief description of venue, contact information (address,

	email and link to website), pictures when available, venue assessment level and answers to the checklist.
Lessons learned	This portal is not yet efficient and most of the venues have incomplete assessment or self-assessment, questioning the reliability of the information. Belgium and Denmark, which already have regional or national access schemes, are the most informed destinations.
Openbritain.net	
Name of the expert conducting research	Carine Guidali/Marion Doublet
Country	United Kingdom and Ireland
Target group involved:	People with disabilities and every person with accessibility needs.
Description:	www.disabledgo.co is the United Kingdom's premier provider of personally-surveyed access information and it details over 70,000 venues. Working directly with public and private sector partners across the United Kingdom, DisabledGo researches and inspects all kinds of venues, awards symbols depending of the kind of accessibility and produces access guides to public venues. There are 20 symbols representing important information that people with disabilities can find out at a glance: • Wheelchair user, • Wheelchair user with assistance, • Mobility impaired walker, • Seat available, • WC adapted, • WC standard, • Adapted changing rooms, • Changing places facilities, • Large print, • Braille, • Assistance dog, • Hearing system, • Contacting the venue, • Home service, • Parking 3 stars, • Parking 2 stars, • Parking 1 star, • Adapted accommodation, • Sign language used, • Disability awareness training, DisabledGo has just contracted with OpenBritain (www.openbritain.net), becoming the largest leisure time information resource in the United Kingdom and Ireland for all those with access needs. It concerns 50,000 inspected tourism and leisure venues. OpenBritain aims to become a one-stop-shop facility for all those requiring accessibility information and assistance, and it is supported by all national tourism authorities and Regional Development Agencies. OpenBritain's objectives are to: • Help people with disabilities travel and book accommodation with access facilities that are suitable for their needs by providing an easy to use, one stop solution.

	• Promote the range of suitable quality leisure activities.
	• Provide a platform for businesses wishing to promote accessible accommodation, travel, attractions, retail, leisure, and sports facilities to people with disabilities.
	• Build a United Kingdom based travel community for people with disabilities so that they can share their experiences, views, suggestions and advice regarding tourism in the United Kingdom.
	The research online is made by destination rather than by kind of venue (accommodation, attractions and travel). For each venue, symbols indicate which kind of disability is taken into account. Description of venues includes when available pictures, accessibility information, links to websites and customers reviews.
	OpenBritain has also created a blog to keep people informed about inclusive events, festivals and things to do in the United Kingdom.

UK DisabledGo and Openbritain portals

ANNEX C9: ANNEXES CONCERNING THE TARGET GROUP "SENIORS"

The following countries have not identified specific programmes for seniors:
Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Hungary, Ireland, Italy, Lithuania, Malta, Poland, Romania, Slovakia, Slovenia, Turkey.

The following tables show the data and criteria collected for each of the indentified good practices for seniors.

Good practices matrix for Senior Tourism (reduced)

	Item	Countries
1	Name of the programme	
2	Target	
3	Main objective	
4	Year of start up (approx)	
5	Countries involved - origin	
6	Countries involved - destinations	
7	Kind of tourism	
8	Period of year	
9	Activities programmed	
10	Stakeholders	
11	Stakeholders with agreements between others	
12	Management of programme	
13	Promotion of programme	
14	Financing: how much	
15	Financing: who pays	
16	Financing: who receives	
17	Beneficiaries in origin	
18	Beneficiaries in destination	
19	Sustainability: environmental	
20	Sustainability: social	
21	Barriers and reasons for non-participation	

Good practices matrix for Senior Tourism (extended)

		Countries
1	Name of the programme	
2	Specific senior's programme	
3	New programme	
4	Start year	
5	Nature of those responsible	
6	Stakeholders	
7	Country where the programme was born	
8	Destination countries of the programme	
9	Clearly defined aim	
10	Operative objectives	
11	Development of the programme in the off-season	
12	Existence of agreements between stakeholders to increase the supply out of the peak season	
13	Thematic supply	
14	Accommodation supply	
15	Transport supply	
16	Enhancement of tourist resources	

| 17 | Enhancement of infrastructures, equipments or services (properly tourist or not) | |
18	Quality and sustainability of the destination resources were considered	
19	Analyses and previous studies were carried out before developing the programme	
20	Analyses and studies about quality of the services or demand satisfaction were carried out	
21	Collaborating stakeholders were identified	
22	Existence of agreements between stakeholders	
23	Collaborating stakeholders from the social tourism area were identified	
24	Stakeholders collaborated to make the programme	
25	Development of the planned programme	
26	Management of the planned programme	
27	Existence of approved budget of the programme	
28	The programme has its own human structure	
29	Existence of a regular monitoring of the economic results	
30	Existence of a regular monitoring of other results (non-economic)	
31	Existence of financing organisms and/or cooperation of international or state organisms in the financing	
32	Existence of a programme communication policy	
33	The programme creates management innovations	
34	The programme creates contents innovations	
35	The programme increased the senior tourism	
36	The programme was born as the result of a social tourism policy	
37	Studies of benchmarking were done	
38	The programme was an inspiration for other programmes of social tourism in and out of the country of origin	
39	Existence of an evaluation of the possibility of putting into practice in other countries	
40	Existence of specific actions in the areas of training to create awareness for the stakeholders or population	
41	The programme produces benefits to the local communities	
42	Number of participants in the programme in 2007 (gender and age)	
43	Number of participants in the programme in 2008 (gender and age)	
44	Number of participants in the programme in 2009 (gender and age)	
45	Number of participants in the programme in 2010 (gender and age)	
46	Number of total participants in the programme	
47	Number or percentage of women participating	
48	Number or percentage of people with disabilities participating	
49	Target population	
50	Seniors profile	
51	Travel habits	
52	Main holiday periods	
53	Main holiday destinations	
54	Preferred activities	
55	Average spending	
56	Way of travelling	
57	Barriers and reasons for non-participation	
58	Requirements	

ANNEX C10: TARGET GROUP "YOUNG PEOPLE" - DEFINITION OF THE TARGET AND MARKET SIZE ACCORDING TO NATIONAL CRITERIA

Task 2 data collection per country shows that the national organisations in charge of young people use different age brackets to define the target group "young people". In that way, data coming from national studies do not allow a consolidation.

Country	Age bracket	Global figure
Austria	Between 20 and 29	1,012,000 people (in 2001) 12.6% of the population
Belgium	Between 15 and 24	84,700 people 12.1% of Belgium population
Bulgaria	-	-
Croatia	Between 15 and 24	67,900 people 12.6% of the population
Cyprus	Between 20 and 29	147,200 people 16.8% of the population
Czech Republic	-	1.5 million people 14% of the population
France	Between 18 and 25	6.5 million people 10% of the population
Greece	Between 15 to 29	2,409,000 people 22% of the population
Hungary	Between 18 and 30	1,786,800 people 18.0% of the population
Italy	-	-
Ireland	Between 18 and 25	-
Latvia	Between 18 and 30	419,400 people 19% of the population
Lithuania	Between 14 and 29	766,000 people 22.7% of the population
Malta	Between 15 and 24	57,100 people 14.1% of the population
Poland	Up to 19	
Portugal	Between 14 and 25	1,221,300 people 11.4% of the population
Romania	Between 20 and 30	3,378,300 people 15.2% of the population
Slovakia	Between 13 and 30	1.5 million people 28% of the population
Slovenia	Between 18 and 30	360,000 people 20% of the population
Spain	Between 15 and 35	12,270,300 people 26.1% of the population
Turkey	Between 18 and 30	14,500,000 people 20% of the population

ANNEX C11 - INFORMATION SOURCES USED TO PLAN TRAVEL[8]

Figure 3: Information sources consulted before travel
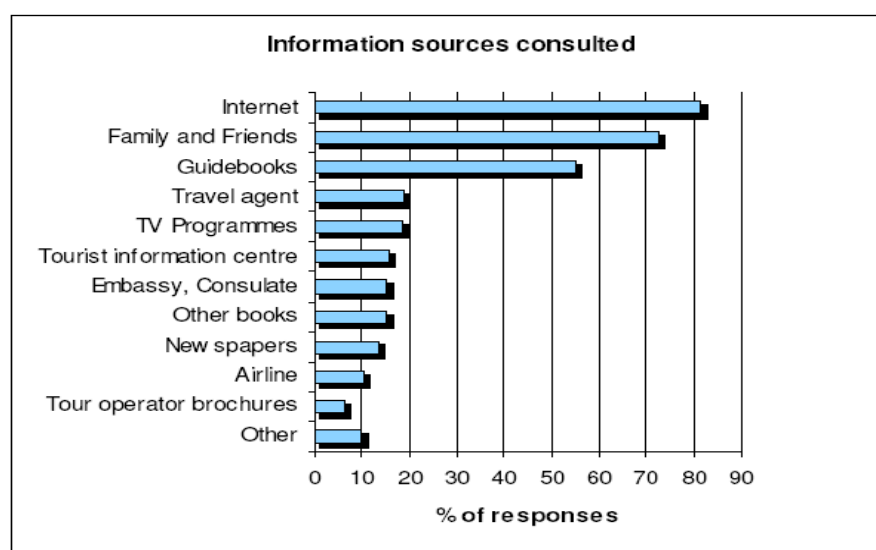
ANNEX C12 - TRAVEL BENEFITS FOR YOUNG PEOPLE[9]

Table 6: Benefits gained from travel

	% important or very important
Developed a thirst for more travel	80,6
Broadened my horizons	74,1
Became more open-minded	72,4
Became more flexible	71,4
Became more confident	69,6
Became more tolerant	61,9
Became better able to make decisions	61,1
Became more patient	54,6
Developed a better understanding of my own culture	54,6
Became more trusting	41,5
Became a new person	28,6

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[8] WYSE – WTO, "Youth Travel Matters. Understanding the Global Phenomenon of Youth Travel", 2008.
[9] WYSE – WTO, "Youth Travel Matters. Understanding the Global Phenomenon of Youth Travel", 2008.

ANNEX C13 – COMPLEMENTARY INFORMATION ON EUROPEAN STAKE HOLDERS & PROGRAMMES

Youth in Action
Youth in Action program priorities are divided into 5 actions:

Action 1: Youth for Europe
It encourages young people's active citizenship, participation and creativity through youth exchanges, youth initiatives and youth democracy projects. This action supports 3 types of activities: Youth Exchanges; Youth Initiatives; Youth Democracy Projects.

The aim of **Youth Exchanges** is to get groups of young people from different countries together so they can explore their social and cultural differences and similarities. With this action, for example, young people can study in a European country. Linguistic exchanges could be integrated in this sub-action. The focus on Youth Exchanges is on:
- groups of young people between 13 and 25;
- groups between 16 and 60 participants;
- between 6 and 21 days for the activity (excluding travel days);
- no distinction between high and low season;
- acceptance of the project: 30% for the relevance to the objectives and the priorities of the programme, 50% for the quality of the project and the methods proposed, 20% for the profile of participants and promoters

Youth Initiatives are projects entirely devised, planned and implemented by young people at local, regional or national levels. The goal of these important non-formal learning experiences is to stimulate young people's creativity, enterprise and initiative. This action concerns in priority young workers.

Youth Democracy Projects encourages experiences of democracy, creation of new national and transnational networks and exchanges of good practice and initiatives for a structured dialogue between decision-makers and young people.

Action 2: European Voluntary Service
It helps young people develop their sense of solidarity by participating, either individually or in groups, in non-profit, unpaid voluntary activities abroad. Young volunteers perform their personal, educational and professional development in an EVS Charter Accreditation organisation. Young people between 18 and 30 who want to do an EVS experience must first choose an EVS organisation before becoming a candidate for this programme. This action permits the experimentation of the work life and the discovery of another culture.

About voluntary activity, other organisms have created experts network or platforms of exchanges of good practices and/or also supported projects as the European Volunteer Centre (CEV). CEV is a European network of volunteer centres and volunteer development agencies supporting and promoting voluntary activity. It is supported by the Education and Culture DG. It is a lobbying group and a platform of exchange of good practices. Targets are young people, migrants and seniors. It organises seminars and creates volunteer programs. It promotes citizenship integration and intercultural dialogue. From CEV, voluntary activity is a learning activity, a first step for employment, an occasion to create intergenerational dialogue and a means of integration for migrant people.

Action 3: Youth in the World
This action promotes partnerships and exchanges among young people and youth organisations across the world. It concerns European and international exchanges and the creation of networks.

Action 4: Youth Support Systems
It includes various measures to support youth workers and youth organisations and improve the quality of their activities. It is a programme of co-operation which refers to a lot of activities such

as job shadowing, feasibility visits, evaluation meetings, study visits and seminars, training courses, as well as partnership building and networking activities. If cultural meetings for young people (music festival for example) could be considered as tourism, the other activities are not really tourism programs.

<u>Action 5: Support for European co-operation in the youth field</u>
It is *a tool to support youth policy development at European level. It encourages exchanges of good practices and dialogue between policy-makers and young people. There are three sub-actions:*
- National and transnational youth seminars
- Improvement of knowledge and understanding of youth
- Co-operation with international organisations

To participate in the Youth in Action programme:
Young people between 13 and 30 or young workers who are energetic, creative and who want to meet people and develop themselves could be a participant. NGOs, local organisations, or a public body could be a promoter of an activity to be supported by the programme. Candidates must contact the National Agency or Eurodesk national office, depending of the action.

European Youth Card EURO<26
EURO<26 / European Youth Card provides 100,000 discounts in 38 countries on different fields:
- Culture: theatres, cinemas, concerts, museums, festivals, events
- Transport: buses, trains, ferries, air travel
- Travel: accommodation, holiday-trips, language courses
- Shops
- Services: insurance, travel assistance, help lines, etc.

The most popular discount categories are[10]:
- Culture: cinema (48%), festivals and events (31%), as well as theatre and opera (24%)
- Mobility: boats, trains and flights (32%), along with hotels, hostels and campsites (21%)
- A substantial number of cardholders also uses EURO<26 card to purchase books, magazines and newspapers (13%), and to get discounted access to sports activities (17%)

Card types: Classic Card, Student Card, and various co-branded cards through partnerships with banks, universities, national railways, local authorities, etc. EYCA also issues the EVS EURO<26 / European Youth Card for participants in the European Voluntary Service.

Card costs: the cost of the EURO<26 / European Youth Card varies according to region and local purchasing power, and ranges from approximately €3 to 19.90.

Communication channels: the EURO<26 / European Youth Card is also part of a strong communication network with young people in Europe, communicating directly with over 4 million young people through 33+ websites, 22+ magazines, annual guidebooks, newsletters, SMS communities, helpdesks and more.

Sponsorship/branding opportunities: many organisations offer sponsorship/branding opportunities both on the card itself and also across various communication channels: banks, universities, national railways, insurance, local authorities, youth hostel associations

A special card, which EYCA issues in cooperation with the European Commission (DG of Education and Culture) is the EVS Card for young people who participate in the European Voluntary Service. The volunteers are aged 16 to 29 (the largest groups are 18 – 25 years old) and their volunteer duration lasts up to 18 months, with the most common period of 12 months. The top five sending countries are Germany, France, Spain, Italy, Poland, UK and France.

Youth Card Association project organises projects and activities for improving the mobility and access to information for young people in Europe, mainly through youth summer camps.

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[10] Euro<26 cardholders survey (30.000 respondents, March 2008)

EUFED

EUFED is engaged in sustainable development and durable mobility with the international multi-measure project "from environmental education to climate change". It is supported by the 4.3 Youth in Action programme and the aim is to develop good practices like eco-labels or environmental education programmes. EUFED declines this environmental priority with the project "Eco-Hostelling", which is supported by the EU. It is an e-learning module for youth hostels with map and action plan. It is also a platform of exchanges of good practices which was developed according to the International Youth Hotel Association Eco-Chart. The goal is to obtain an eco-label like Green Globe. This environmental initiative attracts young people and is also a pedagogic issue.

In 2006, with the support of Action 5 of the Youth in Action programme, EUFED organised the "Youth Hostels and Young Workers Mobility Seminar" to speak about the means to improve work travel opportunities for young people. EUFED supports National Youth Hostel Associations in Social Inclusion projects. These projects aim to give holidays to excluded children (young victims of Chernobyl or ethnic minorities) or families with low income. Small groups of young people can travel in Europe in order to discover other cultures and integrate themselves in society. For example, the project "Breaks4kids" of the Youth Hostel Association England and Wales aims to support 50% of the cost of holidays for children from low income families. With the support of private partners, 3,000 young people have travelled each year since 2006.

Eurolines

Eurolines is the brand under which more than 32 companies across Europe work together to provide the extensive coach network in Europe, connecting over 500 destinations.

Eurolines offers preferential prices to young people up to 26 years old and passes for 15 or 30 days trips:

Pass 15 days	Adult	Up to 26
Low season	205 €	175 €
Mid-season	240 €	205 €
High season	345 €	290 €
Pass 30 days	Adult	Up to 26
Low season	310 €	240 €
Mid-season	330 €	270 €
High season	455 €	375 €

Interrail

InterRailNet.Com is owned by Eurail.Com. Eurail.Com is an eCommerce company which sells Eurail and InterRail train passes online and provides service to customers.

The InterRail Global can only be used by European residents and is valid for train travel in 30 countries. Travel durations vary from 5 days until 1 month.

In 2007, the European Railways launched a new InterRail product offer instead of the old zone system. This offer consists of the classic InterRail Global Pass, valid in all participating European countries, and a range of One Country Passes, replacing the Eurail Domino offer. InterRail is now also possible for adults (over 26 years).

The InterRail Global Pass is valid in all 30 InterRail countries except in the own country of residence.
An InterRail One Country Pass is valid in one country, but not in the own country. Not all countries participating in the Global Pass offer a One Country Pass.

There are several price levels depending upon age and preferred class:
• Global Pass Senior: customers aged 60 years and older. The InterRail Global Pass Senior is available for 1st or 2nd class rail travel.

- Customers aged 26 and older on the first day of travel can buy an Adult Pass, valid in 1st or 2nd class;
- Global pass Youth: customers aged 12 up to and including 25 years old can buy a discounted Youth Pass, which is only valid for 2nd class train travel;
- Customers aged 4 up to 12 years old get a Child discount of 50% on the fare of an Adult Pass, 1st or 2nd class;
- Children aged 0 up to and including 3 travels for free (they may not have their own seat).

Validity:	2nd-class youth	2nd-class adult	1st-class adult	1st-class senior	2nd-class senior
15 days continuous	€279	€399	€599	€539	€359
22 days continuous	€309	€469	€704	€633	€422
1 month continuous	€399	€599	€899	€809	€539
5 days within 10 days	€159	€249	€374	€336	€224
10 days within 22 days	€239	€359	€539	€485	€323

Holders of an InterRail Pass can benefit from bonuses for those entitled to free passage/entrance and those granting a reduction.

World Youth Student and Educational Travel confederation (WYSETC)
The World Youth Student and Educational Travel confederation was founded in 2006 when the Federation of International Youth Travel Organisations (FIYTO) and the International Student Travel Confederation (ISTC) merged. The confederation concentrates on the promotion of travel and educational opportunities for students and young people as a means of increasing international understanding. They publish an annual Youth Travel Industry Monitor, which is a report providing an overview of recent changes in market demand, product supply, and factors affecting business within the youth and student travel industry, as well as insights on how WYSE Travel Confederation members are responding to market conditions and a summary of relevant data, predictions and analysis from the wider travel industry. The Monitor is an important tool to understanding the developments on the demand side and will make it possible for the supply side to react accordingly.[11]

Other programs and initiatives for young mobility for study and work

UNESCO Study abroad
http://portal.unesco.org/education/en/ev.php-
URL_ID=21997&URL_DO=DO_TOPIC&URL_SECTION=201.html
UNESCO international guide to higher-education study opportunities and scholarships offered by higher education institutions and international organisations in over 145 countries includes some 3,000 entries on courses and scholarships in different higher-education academic and professional disciplines.

Euraxess Researchers in motion
http://ec.europa.eu/euraxess
EURAXESS is the Researchers in Motion website, a joint initiative of the European Commission and the countries participating in the European Union's Framework Programme for Research. It is a one-stop shop for researchers seeking to advance their careers and personal development by moving to other countries. In addition to the information on training and jobs, this electronic gateway is the entry point to a wealth of practical information on living, working and relaxing in the involved European countries.

EuroEducation Course Search
http://www.euroeducation.net
It is a guide for international students aiming to study in Europe. Over 900 universities, academies, schools and colleges in Europe are presented with useful information designed to help

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[11] See: http://www.wysetc.org/docs/Youth_Travel_Industry_Monitor_Issue_6.pdf.

undergraduate and graduate students in choosing a wide variety of academic and professional courses in arts, business, economics, engineering, humanities, MBA, management, science, technology, English and other languages.

Euroguidance - Careers Guidance
http://www.euroguidance.net/index.htm
The Euroguidance network exists to promote mobility and to develop the European dimension in guidance. There are Euroguidance centres in all of the EU/EEA and preaccession countries, as well as in Switzerland.

Gateway to recognition of academic and professional qualifications
http://www.enic-naric.net/
This site is a joint initiative of the European Commission, the Council of Europe and UNESCO/CEPES. It aims to help other interested organisations and individuals easily find information on current issues in international academic and professional mobility, and on procedures for the recognition of foreign qualifications. Enic-naric.net> provides national profiles only for those countries that belong to the ENIC and NARIC networks. This includes States that are party to: the European Cultural Convention; the Lisbon Convention or the 1979 UNESCO Convention on the Recognition of Studies in the European Region; as well as States that are member of the UNESCO Europe Region, the Council of Europe, or the European Union, the European Economic Area and associated countries.

International Education Site
http://www.intstudy.com
The International Education Site is a FREE guide to study abroad information, advice and opportunities for students worldwide who are considering studying overseas. It includes university advice, college search facilities, student profiles, and articles from the leading journals on international education.

Language-Learning.net
http://www.language-learning.net/
Find the right language course in the largest online database of language schools world-wide. There are more than 6,000 schools, 80 countries, 70 languages in the database. There are also links to language education resources: certificates, language book finder, organisations and links for language students and teachers.

PLOTEUS, Portal for Learning Opportunities in Europe
http://ec.europa.eu/ploteus
The Portal for Learning Opportunities throughout the European Space, PLOTEUS, is designed to provide detailed, up-to-the-minute information on education and training in 30 European countries. The portal's learning opportunities section provides almost 4,000 links to national or regional databases and to the websites of education or training institutions. Other sections will provide information on education systems, including qualifications, grants and tuition fees; exchange programmes at all levels; contacts with national guidance centres; and hints about practical aspects of going abroad such as accommodation, the cost of living, tax and social security issues.

Study in Europe
http://www.study-in-europe.org
This portal provides up-to-date information on 32 European countries, their universities and what it takes to live and study in them, including information on the search for courses and programmes, information per country on higher education systems, practical details on applying to study in Europe, and living in Europe.

Study opportunities targeted to students from Central and Eastern Europe
http://www.eastchance.com/index.asp
East chance is a website providing centralised access to information about scholarships and career opportunities for students from Central and Eastern Europe (CEE).

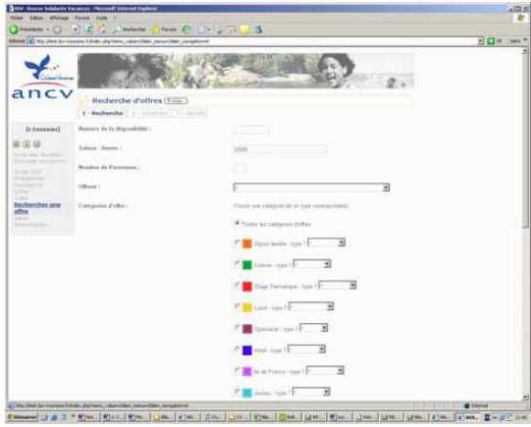### Your Europe - Information for citizens
http://ec.europa.eu/youreurope/
This portal for citizens provides detailed practical information on rights and opportunities in the EU and its Internal Market, plus advice on how to exercise these rights in practice when living, working and studying in another EU country.

ANNEX D
TASK 4 CALYPSO PLATFORM

"Bourse Solidarité Vacances" (BSV)	
Name of the expert conducting research	Carine Guidali Marion Doublet
Country	France
Respondents/informants	Agence Nationale pour les Chèques Vacances
Target group involved:	The beneficiaries of the "Bourse Solidarité Vacances" programme are individuals or families excluded from holidays and leisure activities, mainly because of economic or social difficulties: • Families with low income • Unemployed people • People with minimum welfare payments • Young people in precarious situations • People with disabilities with low income • Seniors with low income and isolated To be eligible, beneficiaries must also be independent enough to build their own holiday plan and integrate themselves without difficulties on the holiday sites proposed by the partners. The most fragile persons, those needing a support to prepare their holidays, are oriented to the programme called "Aides aux Projets Vacances", which is also managed by the ANCV. In 2008, 8,256 people benefited from this programme for tourism and leisure activities, out of which 6,894 people went on holiday. The most important part is families with children and low-income: 76% of families have less than €1,500 per month.
Description:	This programme is an online service of 'solidarity supplies' for the booking of transportation, stays and leisure activities: www.ancv.com The products are offered by accommodation suppliers of all kinds (holiday centres, campsites, mobile homes and hotels) and SNCF (national railway company) at greatly reduced prices (up to 80% discount). BSV was established by the French Ministry for Tourism in 1998 and has been managed by Association Nationale des Chèques-Vacances (ANCV) since November 2006. Indicative cost for a stay of one week (mentioned in the BSV users' guide): - between 70€ and 130€ for rented accommodation, - between 80€ and 130€ per adult on half or full board, - between 0€ and 80€ per child on half or full board. SNCF offers discounted train tickets (for BSV stays only): 30€ per person for a round-trip ticket whatever the destination in France.

Handling of target group needs:	45.3% of the beneficiaries of the programme are single-parent families with low-income or basic income support. The most often requested type of holidays are stays on the seaside for 35% and stays in the mountains for 30%. The BSV programme faces a strong concentration of the requests on full-board stays on the seaside. There is a rule of alternation: the families who have already been to the sea are invited to discover mountain or countryside destinations. The offers during school holidays are reserved first for families with children attending school. In 2007, more than 25,000 places for holiday accommodation were provided by 43 suppliers and 7,000 round trips were offered by SNCF. In 2008, 21,509 holiday stays were collected in France and all year round. With more than 1,500 leisure sites (cultural and sport activities, events), the most underprivileged families enjoyed a free day of discovery and wellness.
Description of support mechanisms	**Partnership ANCV / intermediary organisations** ANCV has implemented partnerships with a network of 275 national or local structures dedicated to social or cultural activities: local/regional administrations, charitable organisations, organisations for the unemployed, social centres, etc which support holiday departure as part of their social or associative project. These organisations act as intermediaries between BSV and the targets: they make a selection of the possible beneficiaries, propose them BSV products, and are responsible for the preparation of the stays. The intermediary organisation sends the application to the ANCV, which makes sure of the relevance of the social project implemented towards beneficiaries and of the legal capacity of the organisations. An annual convention is signed between the ANCV and the organisation. The ANCV gives an access code to the stakeholders, allowing them to consult the offers on the BSV website. **Partnership ANCV / tourism suppliers** The ANCV signs annual conventions with tourism suppliers. Stays sheets are written by the ANCV with the information given by the suppliers and are the basis of the presentation of the offers on the website www.ancv.com. Booking and payment conditions are detailed in the offer, as well as retrocession period (after that the supplier have the right to take back the unused beds). The supplier can give as many offers as he wants during the period of the convention. Each proposition of the tourism supplier gives a description of: - the location of stay and name of the equipment - the dates of stay - the type of accommodation and capacity

	- the type of stay (full-board, half-board, rented accommodation) - the retrocession period of the offer - the rate (and for information public rates too) - the number of offered stays The ANCV gives the tourism supplier an annual report of BSV programme with a specific chapter concerning its offer. Amongst suppliers: Accor, Comités d'action et entraide sociale, Cap France, comités d'entreprises, Center Parcs, Ethic Etapes, Eurodisney, Fédération des œuvres laïques, Odalys, LVT, Relaisoleil, UCPA, ULVF, Vacanciel, VVF… **Reservation process :** The research of a stay is made on line through a set of criteria: type of stay, period, location… The result of the research gives general and detailed information on the stay and the availability of the offer, as well as the time limit for booking (that is to say the period of validity of the offer). The project holder books the stay online and then sends the documents proving the income of the beneficiaries of the stay. The ANCV checks the eligibility of the beneficiaries, activates the booking, and informs the project holder by email. The ANCV is the only contact for the suppliers. Booking of transportation, stays and leisure activities online are made directly by the ANCV. Afterwards, the project holder receives directly from the supplier the final documents on his booking, which will be given to the beneficiaries.
Description of funding mechanisms:	The billing of supplies is directly sent by the supplier/project holder who has made the booking. No billing comes through the ANCV. The BSV stays cannot be paid with holiday vouchers given by means of the ANCV programme "Aides aux Projets Vacances". The stakeholders have to be sure that the beneficiaries prepare a viable budget and will be able to pay for it.

Lessons learned	BSV is an efficient mechanism that could be transferred to the Calypso level. To achieve that, a particular attention should be paid to the selection of the partners – intermediary organisations and tourism suppliers – and to the negotiation of the partnerships, especially concerning the prices or discounts offered.

BITS European web portal "Holidays For All"	
Name of the expert conducting research	Carine Guidali
Country	Europe
Respondents/informants	Charles-Etienne Bélanger, Director BITS (International Bureau of Social Tourism)
Target group involved:	Holidays For All is designed to be adapted to everyone's specific needs - young people, families, seniors, and people with limited physical mobility- and at reasonable prices. All target groups specifically, but not exclusively, include persons with limited financial resources.
Description:	BITS is an international non-profit organisation created in 1963 in order to promote access to leisure, holidays and tourism for the greatest. The mission of BITS also aims at promoting tourism based on sustainability and solidarity which grants benefits to hosting peoples and respects natural and cultural heritage. BITS (International Bureau of Social Tourism) set up its own website, Holidays for All, in March 2009. It was the first international portal of holiday centres and other "tourism for all" accommodations throughout the world: family holiday centres and villages, youth hostels and centres, chalets and bungalows, rural holiday accommodations, camp sites, etc. There is another website called "Holidays For All" in England, but it only operates on a national level and for one segment, i.e. people with disabilities.
Handling of target group needs:	So far, 105 accommodation centres are online, and 90 more should be added in the near future (work in progress). The accommodation centres are mainly Youth hostels, camping, Youth Holiday Centres, Bed & Breakfasts, and Family Holiday Villages. The prices for these different accommodation centres and formulas depend on a large number of factors such as period of stay, season, and type of formula chosen. The web site focuses on the four Calypso targets, but the numbers of accommodation centres are not the same for all of the target groups. At the moment, there are less accommodation options for people with disabilities than for youth or families.
Description of support mechanisms	The web portal is opened and accessible to any Internet user.

The website can be found through the usual search engines such as Google, Yahoo!, etc.
The actual promotion of the website is done through the BITS network through the different means of communications such as magazine, website, newsletters, and the network of its members (Private and public actors).

The conditions for the suppliers to be on the website are as following:
A first condition is that the accommodation suppliers adhere to the values of social tourism and that they share the same values than BITS (Cf. Montreal Declaration). Secondly, they have to be members of BITS in order to be on the portal. Thirdly, the actors come mainly from an associative background.
Every application is carefully examined by the Board of Directors and after validation, access to the portal is given.

As for the criteria for quality standards, BITS refers to and accepts respective quality standards existing in the different countries. Existing quality labels are approved.
In the future, BITS could proceed to the creation of its own quality label, where certain minimum criteria are employed and which the accommodation suppliers should adopt.

Holidays for All enables the finding of an accommodation by combining several criteria (name, country, region, city, type of accommodation, type of stay, themes, type of clientele) and locating it via Google interactive map.
The website is currently bilingual French/English and has been foreseen to expand to other languages. It is also accessible for partially sighted persons.

As a research result, the website provides the full contact details of the accommodation centres and photos, but neither the possible availability nor direct booking.
In the future, BITS sees possibilities to work with existing online reservation platforms.

So far, 105 accommodation suppliers are affiliated with Holidays for All, plus 15 associations, representing 6 countries on 3 continents. The 15 associations are the owners/managers of the accommodation centres and are BITS members. Of the 6 countries (Germany, Belgium, France, Portugal, Canada and Senegal) that are represented on "Holidays for All", 90% is Europe-based. At present time, BITS is represented in 15 countries of the EU and has members in non EU countries, such as Switzerland and in EU countries who actually do not yet participate in the Calypso project (UK, Germany, etc.). On top of this, action has been taken to increase BITS representation in the remaining 12 EU countries.

Holidays For All is also designed to present tourist destinations/regions, but this part has not yet been implemented. The idea is to promote the different regions in Europe and to establish a link between accommodation suppliers and their

	respective regions. It is also envisaged to establish a real dynamic of exchanges between the various regions. BITS' Network of Local and Regional Authorities COLORES can serve as a competent instrument for this kind of synergy.
Description of funding mechanisms:	The development and management of Holidays for All is financed by BITS without any subsidy or public support. The investment cost was about €20,000. BITS estimates that the running costs for the portal are about 35h/month, which is the equivalent of a ¼ job. In the future, since BITS plans a whole development of the portal, these costs for management/administration of this website are estimated to be 1 to 2 full time jobs. The financial conditions for the suppliers are to be redefined and differentiated since BITS employs a few member categories. BITS does offer reduced tariffs (decreased fee) according to the number of centres that are integrated at the same time on the website.
Lessons learned	An audit of the website Holidays for All has been performed and a promotion plan for the promotion towards final users is being drawn up. More concrete proposals will be stated in a following document. In order to improve the visibility on the search engines, contact has been made with the internet company in order to improve some technical aspects (cf. Meta tags). The increase of the number of suppliers and destinations affiliated is part of a larger promotion plan to increase BITS membership approved by the BITS Europe Committee. For now the feedback received from suppliers is quite limited and essentially concerns technical aspects. The suppliers are convinced of the utility of the portal and wish for this project to extend itself to a larger scale. A concrete proposal was made by BITS in 2010 and sent to the Commission Tourism Unit. BITS estimates that the Holidays for All website could very well be developed within the Calypso framework. The aim of this website is to differentiate the social tourism from the traditional commercial offers, to stimulate exchanges between different actors (both private and public actors) of the tourism sector in general, and the social tourism sector in particular, and to promote offers reflecting the values of social tourism to the four target groups defined by Calypso.

ANCV's Proposal of European web portal for youth	
Name of the expert conducting research	Carine Guidali Marion Doublet
Country	Europe
Respondents/informants	ANCV (Agence nationale pour les Chèques Vacances – Holiday Vouchers National Agency) UNAT (Union nationale des associations de tourisme et de plein air – National network of tourism associations)
Target group involved:	The proposal targets youth according to the Calypso definition: young people between 18 and 30 years old. This mechanism should allow the maximum number of people, especially specific underprivileged targets, to go on holiday. The proposal is to give a priority to the support towards young 'independent' people that are already used to going on holiday. It aims at supporting those who cannot go on holiday mainly for financial reasons: • Young travellers with low income, • Students, especially scholars, • Beginners, servicemen, • Unemployed people.
Description of exchange:	UNAT represents the associations of social tourism, meaning 250,000 beds in 1,400 tourism accommodation facilities. ANCV is the public body responsible for the management of the holiday vouchers mechanism that concerns more than 3 million employees. Answering to a request from the French Ministry in charge of tourism, UNAT and ANCV worked together on a project of web portal for youth at the national level. Their proposal was not accepted. In a second step, UNAT and ANCV fine-tuned their proposal within the Calypso framework and presented it in Toulouse. The proposal is a European platform displaying "low-cost stays for young people". This Youth Portal would be a platform for promotional offers dedicated to 18-30 years old that could be set up with European tourism stakeholders, for example social tourism accommodation suppliers.
Handling of target group needs:	The web portal should offer a wide range of offers and allow an independence of choice on: • The type of stakeholders and proposed accommodation facilities, having in mind that people look for more independence with age • The transportation means – for this target "collective transportation" is often the only accessible way of travelling • The departure season – students and unemployed people are a priori less constrained than other by rhythm of school holidays The young people will chose by themselves the components of their stays, making a selection of the stakeholders. They will then

	book a stay directly on the website of the stakeholder.
Description of support mechanisms	The Youth Portal has two objectives: • To offer all young people between 18 and 30 dedicated discounts offered by tourism suppliers • To be the basis of national financial support mechanisms in order to reduce the travel costs of some beneficiaries **Partnership with tourism suppliers** The portal should contact the stakeholders (accommodation, transport, attractions, leisure, sports, culture, etc) to negotiate discounted offers on an annual basis or for limited periods. The website will be developed like a portal with links to booking websites of tourism suppliers who will be partners of the project. The mechanism will rely on powerful organisms at the European scale, for example the movement of Youth hostels (EUFED), other youth accommodation networks (like Ethic Etapes in France), and the world confederation of youth and students travel organisations (WYSE-TC). Moreover, in France for example, the development of the portal could rely on the network of professionals gathered by ANCV: 160,000 suppliers among them 60,000 to 70,000 specialised in accommodation. **Partnership with stakeholders supporting youth** This mechanism implies partnerships with national/local social organisations able to identify and support the underprivileged young people in each participating country. These stakeholders send to the portal lists of young people eligible to national/local support. The portal merges the data so as to have all at once the information related to each beneficiary. When a beneficiary uses the support, and in order to have an additional discount on a holiday offer, he/she is entitled to the social organisations directly paying the supplier the amount corresponding to the discount. **Reservation process** The youth choose a partner supplier and are forwarded to the suppliers' website to select the supplies. When a supplier is chosen, the youth receive a discount code corresponding to this supplier. If they are entitled to social support, this code is completed by a specific code giving him a supplementary discount. The youth then enters the discount code on the website of the supplier to book the chosen supply with a reduced price. The extra discount coming from the social support system is added to the discount entitled to all young people. The youth pays directly to the supplier the chosen supply at a

	reduced rate. If the youth benefited from an extra discount linked to social support, the supplier sends the concerned bill to the social organisation that has given the financial support.		
Description of funding mechanisms:	Public subsidies would be required to develop and run the website from the European Commission and possibly from Member States	The young people users of the web portal pay their discounted packages directly to the suppliers	Each national/local social organisation part of the partnership supports the underprivileged young people eligible according to own criteria
	According to UNAT/ANCV preliminary feasibility study: • The creation costs of the website would be 300,000 euro • The maintenance costs would be 60,000 euro per year • 200,000 euro would be necessary for the prospection of partners at the European level. • The human resources needed are estimated at one person for the launching and management of the website, one person for the relations with tourism stakeholders, and one person dedicated to coordination of social action organisations able to support the mechanism. •		
Lessons learned	This project makes the supporting systems efforts between all partners mutual, especially with a direct participation of tourism suppliers for transport, accommodation, restaurants… It implies swing-wing mechanisms in every country, depending on the available tools, but also on the existing youth policies.		

Malta Social Tourism National Project			
Name of the expert conducting research	Hanna-Maija Saarinen		
Country	Malta		
Respondents/informants	Mr. Victor Carachi, President, General Workers' Union Mr. Tony Coleiro, CEO Travel Malta, independent consultant		
Target group involved:	The social tourism programme is targeted at all the members of the participating Unions and organisations, so it does not specifically direct itself at the four target groups. The goal of the organisers is that by conducting negotiations with representatives of four target groups, it would be possible to offer, in the social tourism portal, services that are specifically directed at the different target groups. The portal already contains some such offers, for example English language courses directed at youth and senior citizens.		
Description of exchange:	The social tourism project is based on the idea of a common portal, where tourism service providers offer their services to the users of the portal for a lower price. The aim of the organisers is to make the portal available for several international unions and employers' organisations. It is currently being taken into use by the General Workers' Union and there are plans to make the portal available for Malta Teachers' Union within the next weeks. Now in the beginning phase (when the portal is being taken into active use by sending passwords to partner unions), the offers that are available are given by Maltese tourism providers, such as hotels and transport (ie. Air Malta gives 15% discount for all flights purchased through the portal). The goal is that at a later phase the portal will also include offers from service providers outside of Malta so that outbound travel from Malta will be covered. The portalhas been in place since August 2009 and it includes offers from several tourism service providers, such as Air Malta, Corinthia Group (hotels) and Avis. The idea is that the service providers are required to offer the users of the portal prices cheaper than those offered on any general portal or their own website. This is monitored by TravelMalta. The offers are valid all year round, not only during off-season.		
Handling of target group needs:	The organisers of the project plan to discuss with representatives all four target groups in order to provide tourism services targeted specifically at the target groups.		
Description of support mechanisms	The portal is currently being implemented and monitored by Travelmalta, with active cooperation from the tourism operator of the General Workers Union – Untours Ltd. The project has the moral support of the Maltese government but financial support has not been provided. The Maltese Tourism Authority has hired a person in order to deal with social tourism.		
Description of funding mechanisms:	No funding mechanism – lower prices come through special offers from the providers.	Participants pay the full prices indicated on the website, but this is lower than prices in general.	The development has been an investment from Travelmalta. They will receive a profit from all sales that happen through

				the portal.
Lessons learned	As the project's starting point was to provide social tourism services for the members of the trade unions, only hotels that were unionised were allowed to provide their offers in the portal in the beginning phase. This led to even higher prices than in the national market. Now more than 30 hotels have joined the portal and are, according to the organiser, competing to be a part of the portal. It is important to see how the portal starts to work in practice before making an assessment of its transferability to the Calypso level. There are however several European level actors who have expressed their interest towards the portal and the tourism exchange mechanism. The question that remains is: how are the services specific to people who are indeed in need of "social tourism" – ie, not just to any members of the participating organisation? If the portal was to be exchanged to the European level, it would most likely be necessary to construct a separate European portal, which the existing Maltese portal could be merged with.			

EURO<26 card	
Country	Europe
Target group involved:	Young people aged under 26 or 30 depending on countries, members or non-members of EURO<26 card
Description:	The European Youth Card Association (EYCA) represents 62 youth card organisations, in 41 European countries, issuing the EURO<26 / European Youth Card to over 4.3 million young people aged under 26 or under 30 depending on the national organisation. The European Youth Card EURO<26 has recently undergone a major change: the age limit for cardholders increased to 30 years old (see country in annexe). The protocol of Lisbon defines the reciprocity of discounts. The card provides 100,000 discounts in 38 countries on different fields (each member offer an average of 1,847 discounts): • Culture: theatres, cinemas, concerts, museums, festivals, events • Transport: buses, trains, ferries, air travel • Travel: accommodation, holiday-trips, language courses • Shops • Services: insurance, travel assistance, help lines, etc. The web site provides: • Youth card info • Available discounts in participating countries. Four filters (per country, region, city and categories of supply) allowed to identified suppliers offering discounts: contact, nature of the service/supply (culture & going out, education, health & beauty, living, places to eat, places to stay, services, shopping, sport & leisure, travel and transport, winter sport), amount of discount • News and European news • Links to EURO<26 projects and activities for improving the mobility and access to information for young people in Europe • Penpals forum: registration and 'safety Net' forum to exchange letters, e-mails, ideas, drawings, photos between young of different countries • Travel articles • Photo gallery • Links to European institutions and programs

Eurodesk	
Country	Europe + 31 countries
Target group involved:	Young people and those who are working with them Eurodesk web site is mainly dedicated for all those looking for information on financial support for projects/activities involving young people, especially for all professionals in the youth field.
Description:	Eurodesk European network is established as a permanent support structure of the Youth in Action Programme of the European Union to: • Facilitate access to European information with respect to the mobility of young people, more specifically in education, professional training, culture and youth • Supply and enhance European mobility information and counselling services for young people and those who work with them • Co-operate with European institutions, networks and associations in this area • Supply information about possibilities of European funding There are national co-ordinators in 31 European countries. The membership of the Eurodesk network is decided at three levels: European level by the Commission, national level where Eurodesk partner is nominated by governmental authorities of each country, and regional level where participation to national networks is decided by the Eurodesk national partners for each country. The co-ordinating body is in charge of: European information and data base management, development of the web site, communication, co-ordination and animation of the network, development and innovation in the youth information field and secretariat, when national partners are responsible for promoting and delivering European information services to the target group. The Eurodesk web site is an information portal positioned as a 'starting point' for all research and information related to young people in Europe: • Global information on youth policy and links • EU opportunities: list and details of funding opportunities to apply (grants, programmes, traineeships, awards and prizes, courses) • Information and links to other European stakeholders and programmes involved in the youth field: European Youth Portal, ERYICA, EYCA, AEGEE (European student Forum), ECYC (European confederation of youth clubs, ESN Erasmus student network, EUFED, European Youth Forum, INJEP (Institut national de la Jeunesse et de l'Éducation populaire), YONET (Youth Opportunities Network) • Links to find European news (magazines, news papers, web sites, etc.), information relays, tools for training sessions, workshops or conferences, list materials (documents, publications, leaflets, videos, training packs, web sites, etc), partners • Discussion forum platform for professionals to exchange information, such as a question/answer platform

Europeforall.com	
Name of the expert conducting research	Marion Doublet
Country	Europe – 6 countries involved: Austria, Belgium, Denmark, Greece, Norway, Sweden and the United Kingdom
Target group involved	All travellers who need accessibility information to plan their holiday
Description	The website www.Europeforall.com developed in a European Commission funded project named OSSATE provides accessibility information about tourist venues in 6 European countries. The website, which is available as a service for venue owners and data providers in Europe, is managed by EWORX S.A., Greece. The main function of Europeforall.com is to help travellers who need accessibility information to plan their holiday or business trip more easily and with confidence. The EfA database contains the results of individual assessments of venue accessibility based on standard questions and checklists. The search is made by destination, and for each venue, the website gives a brief description of venue, contact information (address, email and link to website), pictures when available, venue assessment level and answers to the checklist.
Lessons learned	This portal is not yet efficient and most of the venues have incomplete assessment or self-assessment, questioning the reliability of the information. Belgium and Denmark, which already have regional or national access schemes, are the most informed destinations.

DisabledGo & Openbritain.net	
Name of the expert conducting research	Carine Guidali/Marion Doublet
Country	United Kingdom and Ireland
Target group involved:	People with disabilities and every person with accessibility needs
Description:	www.disabledgo.co is the UK's premier provider of personally-surveyed access information and details over 70,000 venues. Working directly with public and private sector partners across the United Kingdom, DisabledGo researches and inspects all kinds of venues, awards symbols depending of the kind of accessibility and produces access guides to public venues. There are 20 symbols representing important information that people with disabilities can find out at a glance: • Wheelchair user, • Wheelchair user with assistance, • Mobility impaired walker, • Seat available, • WC adapted, • WC standard, • Adapted changing rooms, • Changing places facilities, • Large print, • Braille, • Assistance dog, • Hearing system, • Contacting the venue,

	- Home service, - Parking 3 stars, - Parking 2 stars, - Parking 1 star, - Adapted accommodation, - Sign language used, - Disability awareness training, DisabledGo has just contracted with OpenBritain (www.openbritain.net), becoming the largest leisure time information resource in the United Kingdom and Ireland for all those with access needs. It concerns 50,000 inspected tourism and leisure venues. OpenBritain aims to become a one-stop-shop facility for all those requiring accessibility information and assistance, and it is supported by all national tourism authorities and Regional Development Agencies. OpenBritain's objectives are to: - Help people with disabilities travel and book accommodation with access facilities that are suitable for their needs, by providing an easy to use, one stop solution. - Promote the range of suitable quality leisure activities. - Provide a platform for businesses wishing to promote accessible accommodation, travel, attractions, retail and leisure and sports facilities to people with disabilities. - Build a United Kingdom based travel community for people with disabilities so that they can share their experiences, views, suggestions and advice regarding tourism in the United Kingdom. The research online is made by destination rather than by kind of venue (accommodation, attractions and travel). For each venue, symbols indicate the kind of disability taken into account. Descriptions of venues include, when available, pictures, accessibility information, links to websites and customers reviews. OpenBritain has also created a blog to keep people informed about inclusive events, festivals and things to do in the United Kingdom.