



REPORT ON LONG- TERM ROLL-OUT AND SUSTAINABILITY OF PROJECT OUTPUTS



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The NRSP model

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EXECUTIVE SUMMARY

This report analyses the roll-out and sustainability of the National/Regional Skills Partnership (NRSP) model. Based on twelve NRSPs' experiences, it documents achievements, challenges, and pathways for a lasting impact.

The EU tourism sector faces a skills gap, worsened by digital and green transitions and a fragmented SME structure. The NRSP model addresses this by uniting industry, education, and public authorities in a permanent governance framework.

Findings show the NRSP model is adaptable, with mature partnerships delivering tangible outputs like the Dutch Labour Market Monitor and Portugal's training programmes. Financial sustainability remains a vulnerability, as most NRSPs operate voluntarily without dedicated budgets. Inconsistent state engagement limits policy influence.

To ensure sustainability, the report proposes a three-pillar framework: (1) Institutional recognition: Formalising NRSPs with clear mandates and brand identities; (2) Diversified funding: Securing industry co-funding, state seed funding, and EU support via the Pact for Skills; (3) Tangible outputs: Delivering concrete annual results to maintain engagement.

Recommendations urge coordinators to formalise structures and register on the Pact for Skills; governments to provide mandates and seed funding; and the EU Commission to promote the model for skills governance.

1. INTRODUCTION

1.1 Purpose and scope of the report

This report constitutes Deliverable D.7.2 of the PANTOUR project, "Report on Long-term Roll-out and Sustainability of Project Outputs." It presents a comprehensive, evidence-based analysis of the long-term roll-out and sustainability of the National/Regional Skills Partnership (NRSP) model, one of the key outputs of the four-year PANTOUR project. While the PANTOUR project has produced several outputs – including the Strategic Skills Intelligence Model (SSIM), the update of eleven (11) occupational profiles, the production of the Skills Strategy and Action Plan, the update of green, digital and social skills training programme contents and methods (50 in total), and the testing of the sectoral skills matrices – the long-term roll-out and sustainability of all these outputs is inextricably linked to the sustainability of the NRSPs themselves. The NRSPs are not merely one output among many; they are the primary vehicle through which all other project outputs are intended to be maintained, disseminated, and continuously applied after the project ends. For this reason, while this report acknowledges the full breadth of the project's outputs, its analytical focus is necessarily centred on the NRSPs as the connective tissue that holds the project's long-term impact together.

Grounded in the real-world experiences of twelve NRSPs across Europe, the report moves beyond theoretical frameworks to document what has been achieved, what challenges have been encountered, and what pathways exist for ensuring the lasting impact of this model beyond the project's lifespan.

The report serves two distinct but complementary purposes. First, it provides a transparent and accountable record of progress towards the project's sustainability objectives for the European Commission and the European Education and Culture Executive Agency (EACEA), directly addressing the indicator associated with Milestone M.45: "outputs and action plans are adopted by regional and national public institutions." Second, and equally importantly, it is designed to serve as a practical, evidence-based guide for regional and national

public institutions, policymakers, and sector stakeholders who are considering the adoption, replication, or strengthening of similar multi-stakeholder skills governance structures in their own contexts.

The analysis is built on a rich and diverse evidence base, comprising structured monitoring forms completed by all NRSP partners, qualitative feedback questionnaires completed by six NRSP coordinators in February 2026, the April 2024 country reports on the operational status of each NRSP, including the Minutes of Meetings of the NRSPs (when available), the D3.1 and D3.2 reports on NRSP coordination and activatability, and the PacTS4ALL Final Report. Together, these sources provide both the quantitative and the qualitative data needed for a comprehensive assessment¹.

The report opens by situating the NRSP model within its broader strategic context, before presenting a quantitative assessment of partnership performance against the monitoring indicators. This evidence base then informs a series of detailed country profiles, which examine the different governance and operational models that have emerged across the network. Building on these profiles, the report turns to the concrete activities and success stories from across the network, before offering an assessment of the critical barriers to long-term sustainability. The final sections draw on the lessons learnt to propose a practical framework for long-term roll-out, and conclude with a consolidated set of findings and recommendations addressed to all key stakeholders.

¹ The following source documents are reproduced in full in Appendices C-E of this report: the NRSP monitoring forms (2024–2026) (Appendix C), the NRSP feedback questionnaires (February 2026) (Appendix D), the April 2024 Country Reports on NRSP operational status (Appendix E).

1.2. Strategic context: why skills partnerships matter for European tourism

The European tourism sector stands at a critical juncture. The twin digital and green transitions, coupled with shifting consumer behaviours, post-pandemic recovery challenges, and persistent structural labour shortages, demand a workforce equipped with rapidly evolving skill sets. The sector faces a paradox: it is one of Europe's largest employers, accounting for approximately 10% of EU GDP and employing over 22 million people directly (European Commission, 2022), yet it consistently struggles to attract, retain, and develop the talent it needs. This challenge is compounded by the sector's structural fragmentation: over 90% of European tourism businesses are micro and small enterprises (European Commission, 2014), often lacking the resources, expertise, and time to invest systematically in workforce development.

This structural reality creates a fundamental market failure. Individual businesses, particularly SMEs, cannot single-handedly drive the large-scale upskilling and reskilling initiatives that the sector requires. Training providers, operating in isolation, risk developing curricula that are misaligned with real-world business needs. Public authorities, without reliable intelligence from the sector, struggle to design effective policy interventions. The result is a persistent and widening skills gap that undermines the competitiveness, quality, and sustainability of European tourism.

It is precisely within this context that the NRSP model provides a vital and innovative mechanism for strategic coordination. By bringing together industry associations, education and training providers, public authorities, and social partners within a structured, permanent governance framework, NRSPs create the conditions for a systemic, collaborative approach to skills development. They serve as the essential bridge between the strategic objectives of the EU Pact for

Skills in Tourism and the operational realities of the industry on the ground. They are, in the words of the Portuguese NRSP:

"Not isolated but consistently embedded within broader strategies for integrated tourism development. This ensures skills policies connect to sectoral priorities, business needs, and competitiveness goals."

The NRSP model is not a new invention. Several of the partnerships covered in this report have roots in earlier EU-funded projects, most notably the NTG (New Tourism Generation) project, which preceded PANTOUR. The PANTOUR project has built on this foundation, strengthening existing NRSPs, supporting the establishment of new ones, and developing a comprehensive toolkit of methodologies and tools, including the Strategic Skills Intelligence Model (SSIM), new occupational profiles, and a suite of training courses, that NRSPs can use to fulfil their mandate. This report assesses the extent to which these partnerships have taken root and are positioned to continue generating value long after the project's formal conclusion.

1.3. Overview of the twelve NRSPs

The PANTOUR project has supported the development and operation of NRSPs in twelve European countries. Each NRSP operates within a unique national or regional context, reflecting the diversity of the European tourism ecosystem. While they share a common mission, to serve as a permanent, multi-stakeholder governance structure for skills development in the tourism sector, they have adopted different governance models, membership compositions, and operational approaches. This diversity is a core theme of this report, demonstrating the adaptability of the NRSP concept to a wide range of national and regional circumstances.

The table below provides a comparative overview of the twelve NRSPs covered in this report:

NRSP Name	Country	Coordinating Partner	Established	Governance Model	Status
CNFT (Comissão Nacional de Formação Turística)	Portugal	Turismo de Portugal	Pre-project	Institutional	Active
FECT (Foro Español por las Competencias Turísticas)	Spain	CEHAT / ITH	2022	Industry-Led	Active
Hospitality Pact	Netherlands	BUAs / CELTH	2022	Pilot-Based	Active
VIMOSZ NRSP	Hungary	VIMOSZ	2022	Hybrid	Active
Aegean NRSP	Greece	University of the Aegean	2022	Academic-Led	Active
SAMK NRSP	Finland	MaRA / SAMK	2022	Academic-Led	Active
NSG Italia	Italy	UNIONCAMERE / Federturismo	2022	Chamber of Commerce-Led	Active
NSG Bulgaria	Bulgaria	Zangador Research Institute	2022	Pilot/Emerging	Active
Careers Oversight Group (COG)	Ireland	TU Dublin	Pre-project	Academic-Led	Inactive
RSP Latvia	Latvia	Riga Planning Region	2025		New
Regional Tourism Skills Partnership	Moldova	Employer's Association of the Tourism Industry (APIT)	2026	Industry-Led	New
Sectoral Committee for occupational standards in services	Slovenia	CPI	2024	Advisory board	New

It is important to note that the NRSPs are not homogeneous entities. They differ significantly in terms of their size (from 16 to over 120 member organisations), their level of institutionalisation, their funding arrangements, and their operational

maturity. This diversity is both a strength, reflecting the adaptability of the model to different national contexts, and a challenge for comparative assessment. The analysis in this report acknowledges these differences and seeks to draw lessons that are relevant across the full spectrum of NRSP models.

1.4. Methodology

The analysis in this report is based on a mixed-methods approach, combining quantitative and qualitative data from multiple sources. This triangulation of evidence strengthens the reliability of the findings and allows for a more nuanced interpretation of the data. The methodology was designed to capture not only what the NRSPs have achieved (the quantitative dimension) but also how and why they have achieved it (the qualitative dimension).

Primary data sources

NRSP monitoring forms (2024–2026): Structured monitoring forms were completed by all nine PANTOUR project partners operating NRSPs (Portugal, Spain, Netherlands, Hungary, Greece, Finland, Italy, Bulgaria, and Ireland). These forms, organised around four monitoring scopes, provide a standardised dataset for comparative analysis of indicator achievement. The most recent forms were submitted between April 2024 and March 2026².

NRSP feedback questionnaires (February 2026): A qualitative questionnaire was distributed to NRSP coordinators in February 2026, ahead of the PANTOUR International Conference in Brussels. Responses were received from six NRSPs: Finland, Netherlands, Portugal, Spain, Greece, and Hungary. These responses

² The completed NRSP monitoring forms (2024–2026) for eight partner NRSPs are reproduced in full in Appendix C of this report.

provide rich, narrative insights into the successes, challenges, and practical lessons learnt during implementation³.

Secondary data sources

April 2024 Country reports on NRSP operational status: Reports submitted by all PANTOUR project partners in April 2024, providing a detailed snapshot of the operational status, governance structure, membership, and SWOT analysis of each NRSP at that point in time⁴.

D3.1 Report on NRSPs coordination and cooperation: This report, produced under Work Package 3 (WP3) of the PacTS4ALL project, provides a comprehensive analysis of the coordination and cooperation mechanisms within the NRSP network, including a detailed assessment of the challenges and opportunities identified during the project's implementation.

D3.2 Report on activatability of new NRSPs: This report, produced under WP3 of the PacTS4ALL project, analyses the conditions required for the successful establishment of new NRSPs, drawing on the experiences of the PANTOUR project and the broader European context.

PacTS4ALL Final report: The relevant sections of this report (Section D.1 on skills groups coordination and Section D.3 on support to new NRSPs) provide additional comparative data and analysis from a related EU-funded initiative.

³ The completed NRSP feedback questionnaires (February 2026) from Finland, Netherlands, Portugal, Spain, Greece, and Hungary are reproduced in full in Appendix D of this report.

⁴ The April 2024 Country Reports on NRSP operational status for all PANTOUR project partners are reproduced in full in Appendix E of this report.

Limitations

It is important to acknowledge several limitations of this evidence base. First, the information in the monitoring forms and questionnaires is self-reported by partners, and the level of detail and rigour varies across submissions. Second, the date of the most recent update differs across the partnerships, making direct temporal comparisons difficult. Third, data for Latvia and Moldova is more limited than for the other NRSPs, reflecting their earlier stage of development. Fourth, Ireland's NRSP has been inactive during the reporting period, meaning that the analysis of this case is necessarily more qualitative and contextual in nature. These limitations are acknowledged throughout the report, and the analysis is calibrated accordingly.

2. MEASURING PROGRESS

This chapter provides a quantitative, evidence-based assessment of NRSP performance, drawing primarily from the data submitted in the monitoring forms. The analysis is structured around the four monitoring scopes defined in the project's quality assurance framework, providing a standardised lens through which to assess the progress and maturity of each NRSP.

2.1. The Monitoring framework

The monitoring framework, detailed in the PANTOUR NRSP Manual, was designed to provide a consistent and comparable method for tracking the progress of a diverse set of partnerships. It is not intended as a rigid performance management tool, but rather as a framework for structured self-assessment and peer learning. The four scopes are not sequential stages, but interconnected dimensions of partnership activity that are expected to develop in parallel.

The monitoring framework used to assess NRSP performance is built around four interconnected scopes, each capturing a different dimension of partnership activity:

Scope 1: Overview of activities performed measures the establishment and operational rhythm of the partnership's governance. Key indicators include the number of member organisations, the frequency and attendance of meetings, the existence of a formal activity plan, and the establishment of internal working groups. This scope provides a baseline assessment of whether the NRSP is functioning as an active, structured partnership.

Scope 2: "Lowest Common Denominator" tasks measures the core value-added activities related to skills intelligence and the testing of PANTOUR project outputs. This scope assesses whether the NRSP is fulfilling its primary mandate:

identifying skills needs, reviewing learning programmes, and contributing to the validation and improvement of the tools and methodologies developed within the PANTOUR project.

Scope 3: Communication activities measures the partnership's efforts to build visibility, engage with its broader stakeholder community, and disseminate its work. Key indicators include the use of digital communication tools, participation in external events, and the development of a distinct brand identity.

Scope 4: Financial sustainability measures the partnership's progress towards securing long-term financial viability beyond the lifespan of the PANTOUR project. This is the most critical scope for the purposes of this deliverable, as it directly addresses the question of whether the NRSPs are positioned to continue operating independently after the project concludes.

2.2. Scope 1: Governance and operational performance

A comparative analysis of the key governance indicators across the NRSP network reveals a picture of active and structured partnerships, albeit with significant variation in the level of formalisation and institutional embeddedness.

Membership and composition

The NRSPs have collectively succeeded in establishing multi-stakeholder groups that bring together representatives from the tourism industry, education and training providers, and public authorities. However, the size and composition of these groups varies considerably. At one extreme, the Spanish FECT boasts over 120 member organisations, making it by far the largest NRSP in the network. Portugal's CNFT, while smaller in terms of direct membership, operates through a network of 12 regional commissions, giving it an unparalleled territorial reach.

At the other extreme, the Bulgarian NSG and the Italian NSG are smaller, with less than 20 members.

A common weakness identified across nearly all NRSPs is the under-representation of public authorities, particularly relevant national ministries. This is a fundamental structural weakness that limits the strategic impact of the NRSPs. In Italy, the Italian government ministries (Ministry of Tourism, Ministry of Education and Merit, Ministry of University and Research, Ministry of Labour and Social Policies) competent in the partnership's areas of interest are not represented. This pattern is repeated in Bulgaria (only one public authority, Varna Municipality), Germany (two public bodies), and to varying degrees in Finland, Greece, and Hungary. The exceptions are Portugal, where the NRSP is led by the national tourism authority, and Ireland, where the COG was historically chaired by Fáilte Ireland before becoming inactive.

This lack of public authority participation is not merely a governance gap but a fundamental strategic weakness: without a concrete participation of the concerned Ministries and without a constructive cooperation with the private sector, the room for manoeuvre remains restricted.

Meeting frequency and participation

All active NRSPs have maintained a consistent meeting schedule throughout the project period. Spain and Portugal held eight (8) and seven (7) formal meetings respectively in the most recent reporting period, with Hungary holding six (6). Italy held nine (9) meetings between 2022 and 2025, including a mix of online and in-person sessions. The Netherlands organised its meetings around specific project milestones, ensuring that each meeting had a clear purpose and deliverable.

Participation rates in meetings have generally been strong among the more mature NRSPs. Portugal achieved the highest average participation, with over 60 individuals attending each meeting of the national commission. Spain maintained consistent attendance, meeting the 60% threshold in most sessions. The Italian NSG, with an average of 4.5 participants per meeting, appears to have lower attendance, though this figure may not fully reflect the broader engagement of members who participate through the four internal working groups.

Activity plans and internal organisation

The existence of a formal activity plan is a strong indicator of an NRSP's operational maturity. Most NRSPs have adopted formal activity plans or Terms of Reference, providing a clear mandate and direction for their work. The Netherlands stands out for publishing its full yearly programme on its website, enhancing transparency and accountability. This practice not only keeps members informed but also serves as a powerful communication tool, demonstrating the partnership's commitment to a clear and public agenda. For the Netherlands, the activity plan is a "continuation of previous one", suggesting a mature and stable planning process. Italy has structured its work around four internal thematic working groups, each with a designated leader: Events and Communication (led by FTO), Toolkit Testing (led by Federturismo), Skills Matrix and Skills Intelligence (led by the University of Pisa), and Certification of Competences (led by Unioncamere). This structure provides a clear division of labour and ensures that all key areas of NRSP activity are covered.

2.3. Scope 2: Skills intelligence and testing

The core function of an NRSP is to act as a bridge between industry needs and training provision, generating and disseminating reliable skills intelligence and contributing to the quality assurance of training content. The most mature NRSPs

have succeeded in this area, developing methodologies and delivering tangible outputs.

Skills identification and intelligence

The partnerships in Spain, Portugal, Finland, and the Netherlands have conducted the most systematic skills intelligence work. Spain's FECT has developed a comprehensive approach to skills identification, combining industry surveys, expert panels, and the validation of PANTOUR's occupational profiles. Portugal's CNFT has commissioned and published a national Labour Market Study, which is currently being updated by the University of Aveiro (expected Q1 2026). Finland's SAMK NRSP has focused on identifying critical soft skills gaps through a series of targeted industry seminars, bringing together employers, educators, and policymakers to discuss the practical realities of the tourism workforce. The [Netherlands' Hospitality Pact](#) has developed a sophisticated skills intelligence tool in the network: the Hospitality Labour Market Monitor, which combines quantitative data with qualitative interviews to provide a nuanced, evidence-based picture of workforce trends.

Hungary identified three priority skills gaps through its intelligence work: data analytics and decision-making skills, environmental tourism policy-making skills, and change and adaptability skills. Greece focused its intelligence work on digital skills, particularly the impact of artificial intelligence on tourism employment, through a combination of online surveys, expert panels, and employer roundtables. Italy's NSG, through its Skills Matrix and Skills Intelligence working group led by the University of Pisa, has been developing a national skills matrix for the tourism sector, providing a structured framework for identifying and tracking skills needs over time.

Learning programme review and curriculum development

The connection between skills identification and training provision is most clearly evident in Portugal and Spain. Portugal has gone furthest in translating intelligence into action, with the CNFT's work directly informing the creation of large-scale national training programmes. Spain has systematically reviewed and evaluated learning programmes for all three core skills areas identified by the PANTOUR project (social, green, and digital skills), providing detailed feedback to training providers and advocating for curriculum reform.

In Italy, the Toolkit Testing working group led by Federturismo has been responsible for evaluating the PANTOUR project's tools and methodologies, including the SSIM. The December 2023 meeting of the Italian NSG was specifically dedicated to the experimentation of the PANTOUR toolkit, with participants providing feedback on its usability and relevance. The June 2024 meeting continued this work, with a focus on the practical application of the occupational profiles developed within the project.

Testing of PANTOUR outputs

The NRSPs have served as a critical European testbed for the tools and methodologies developed within the PANTOUR project. Spain was the most comprehensive tester, evaluating all major outputs including the Skills Lab, occupational profiles, training courses, and the SSIM. The Netherlands tested the SSIM in a Dutch research pilot and organised a feedback session with different subsector associations to reflect on the new occupational profiles. Italy conducted a dedicated focus group on the SSIM in September 2025, bringing together representatives from the NSG Italia to evaluate the Strategic Skills Intelligence Model. The focus group provided valuable feedback on the model's applicability to the Italian context, identifying both its strengths as a structured framework for skills intelligence and the adaptations needed to make it fully operational within the Italian institutional landscape. The results of this focus group have been

incorporated into the final version of the SSIM and are documented in the Synthetic Report (Federturismo, 2025). Hungary focused on piloting the PANTOUR-developed training programmes with local businesses. In contrast, Ireland reported limited or no testing activities, reflecting its inactive status.

2.4. Scope 3: Communication and visibility

Most NRSPs are actively engaged in communication and dissemination activities. However, the level of sophistication and ambition in communication strategy varies considerably across the network.

Hungary and the Netherlands have been the most proactive in building their external profile. Hungary has developed a dedicated NRSP website and newsletter, and has organised or participated in 6 external events to promote its work. The Netherlands has leveraged the established Hospitality Pact brand to build visibility, organising an annual flagship event that brings together industry leaders, educators, and policymakers to discuss the findings of the Labour Market Monitor. Spain has effectively leveraged the established [Thinktur platform](#), a well-known digital hub for tourism innovation and knowledge, for the dissemination of its work, reaching a broad audience of industry professionals and policymakers.

The development of a distinct brand identity, including a logo and a clear name, has been completed by some NRSPs (Hungary, Spain) but not all. The Spanish FECT's decision to give the partnership a formal name, a clear mission, and a visible brand has been a key factor in its ability to attract and retain members, as it provides a tangible sense of identity and purpose.

2.5. Scope 4: Financial sustainability and long-term commitments

This is the most critical area of assessment and reveals the greatest structural vulnerability across the network. The monitoring data presents a consistent picture: the overwhelming majority of NRSPs operate on a fully voluntary basis, with no dedicated budget for coordination or activities. This is identified as the single greatest threat to the network's long-term viability.

The voluntary basis challenge

With the exception of Portugal, where the NRSP benefits from the permanent institutional infrastructure and support of Turismo de Portugal, all NRSPs in the network rely entirely on the in-kind contributions of their members. This means that the time invested by coordinators, the venues for meetings, and the resources for activities are all provided voluntarily, without financial compensation. While this model has proven sufficient to maintain basic operational activity during the project period, when the NTG and the PANTOUR projects themselves provided a degree of external motivation and support, it is widely recognised as unsustainable in the long term.

The lack of financial and human resources dedicated full-time to the development of all the opportunities that an NRSP could potentially seize is identified as a key weakness. The threat of progressive decline is also acknowledged because without a specific budget available and with the progressive fading of the strong driving force provided by the Pact for Skills in Tourism and by the PANTOUR project, the activities of the NRSPs may progressively decrease.

Notable exceptions and emerging models

Two models offer potential pathways forward. Portugal's CNFT benefits from the permanent institutional infrastructure and support of Turismo de Portugal, making it the most financially sustainable NRSP in the network. The Netherlands has successfully secured co-funding from industry associations for its pilot projects, operating on a "co-funding principle" where sector partners match contributions in cash or in-kind. This model has proven effective in maintaining stakeholder engagement and ensuring that projects are demand-driven. The Netherlands is also actively pursuing additional external fund applications for 2026, demonstrating a proactive approach to financial sustainability.

Hungary has made the most explicit progress towards securing dedicated funding, with the launch of a national digital skills development project that provides a financial basis for NRSP activities. The partnership has also expressed the highest confidence in its long-term sustainability among the non-institutionally funded NRSPs.

3. THE NRSP MODEL IN PRACTICE

While the quantitative data in Chapter 2 provides a structured snapshot of performance, the qualitative evidence reveals that the NRSPs are not simply variations on a single theme. They represent distinct governance models, each shaped by the specific institutional, cultural, and economic context of its country. This chapter analyses these models through detailed country profiles.

3.1. Portugal

Coordinating entity

Turismo de Portugal, the national tourism authority, is both the PANTOUR project partner and the coordinating entity of the Comissão Nacional de Formação Turística (CNFT). This dual role is a major strength, as it ensures that the NRSP has direct institutional backing and access to national policy levers.

Overview and governance

The Portuguese CNFT represents the most mature and institutionally embedded NRSP in the network. Led by Turismo de Portugal, the national tourism authority, it benefits from a clear legal mandate, dedicated public infrastructure, and direct alignment with national tourism strategies. Its structure is comprehensive, comprising a national commission and 12 regional commissions, ensuring that its work is both strategically coherent and locally relevant. The CNFT's activities are

supported by the extensive Turismo de Portugal Schools Network, providing a permanent infrastructure for training delivery and curriculum development.

Unlike most other NRSPs in the network, the CNFT is not a new creation of the PANTOUR project. It is a pre-existing structure with deep roots in the Portuguese tourism ecosystem, which has been strengthened and expanded through its participation in the project. This pre-existing institutional foundation is the primary source of its comparative advantage in terms of sustainability.

Membership composition

The CNFT has over 40 members, making it one of the largest partnerships in the network.

Category	Number
Tourism Industry	30
Public Authorities	9
Education and Training Providers	7
Total	46

Members include all ministries with responsibility for defining public policies on education and training in tourism, major business and professional associations, trade unions, and leading academic institutions.

Key activities and achievements

The CNFT's most significant achievement during the PANTOUR project period has been the translation of skills intelligence into large-scale, nationally implemented training programmes. This is a direct response to the needs identified by the sector, and a powerful demonstration of the value of a permanent, institutionalised skills partnership. The "Formação + Próxima" (Training Closer to Companies) programme represents a direct response to the intelligence gathered through the NRSP, bringing training provision directly to tourism

businesses rather than requiring employees to travel to training centres. The "Integrar para o Turismo" programme addresses a specific and growing skills challenge: the integration of migrants into the tourism workforce, providing language and sector-specific skills training to a population that represents an increasingly important source of labour for the sector.

The CNFT has also been a strong advocate for the use of EU-level frameworks and tools. As a participant in the EU Pact for Skills, the NRSP has aligned its work with the Tourism Large-Scale Skills Partnership roadmap. It reuses and adapts PANTOUR methodologies, maximising European leverage while grounding actions in national realities.

Sustainability assessment

The CNFT's long-term sustainability is the most secure of all the NRSPs in the network, by virtue of its institutional embedding within Turismo de Portugal. However, even this model is not without its vulnerabilities. The Portuguese coordinator identified several areas for improvement: a need for faster "lab-to-market" transfer of research findings, greater regularity and intensity of activities, a stronger evidence base through applied research, more cross-regional and EU exchange, and, notably, dedicated funding to support the Commission's work. This last point is significant: even the most institutionally embedded NRSP in the network recognises that dedicated financial resources would enhance its capacity and impact.

3.2. Spain

Coordinating entity

CEHAT (Spanish Confederation of Hotels and Tourist Accommodation), in collaboration with ITH (Instituto Tecnológico Hotelero), coordinates the FECT.

Overview and governance

The Spanish Foro Español por las Competencias Turísticas (FECT), coordinated by the national hotel association CEHAT and the hotel technology institute ITH, exemplifies a dynamic, industry-led approach to skills governance. With over 115 member organisations, including 63 from the tourism industry, 42 from education and training, and 10 from public authorities, it is by far the largest NRSP in the network in terms of membership. Its composition, with a deliberate balance of 50% industry and 50% academia, reflects a commitment to ensuring that its work is both market-relevant and academically rigorous.

The FECT was formally established in 2022 and has rapidly developed into one of the most active and visible NRSPs in the network. Its decision to give the partnership a formal name, a distinctive brand identity, and a clear mission statement ("to be the national body in charge of proposing new training pathways") has been a key factor in its success in attracting and retaining members.

Membership composition

The FECT is the largest NRSP in the network, with 115 members.

Category	Number
Tourism Industry	63
Public Authorities	10
Education and Training Providers	42
Total	115

The database is segmented by professional profiles (e.g., hotel human resources managers, hotel directors) to enable targeted consultation. A Memorandum of Understanding has been signed with Thinktur, the Tourism Technology Platform.

Key activities and achievements

The FECT's most distinctive contribution to the PANTOUR project has been its role as the most comprehensive validator of the project's outputs. This systematic validation work has been invaluable to the PANTOUR project, ensuring that its tools and methodologies are robust, relevant, and ready for market. The Spanish NRSP tested all major PANTOUR outputs, such as the Skills Lab, the new occupational profiles, the green, social, and digital skills training courses, and the SSIM. This systematic validation work provided invaluable feedback to the project team and ensured that the tools were fit for purpose for the Spanish context.

Beyond validation, the FECT has been active in disseminating the results of its work to a wide audience. It has leveraged the Thinktur platform, a well-established digital hub for tourism innovation, to reach thousands of industry professionals and policymakers. It has organised workshops and events, including a notable event on social skills in partnership with ILUNION (a social enterprise with over 30,000 employees, 50% of whom have disabilities), demonstrating the FECT's commitment to inclusive skills development.

Sustainability assessment

The FECT's primary sustainability challenge is financial. Operating on a purely voluntary basis, its long-term viability is dependent on its ability to continuously demonstrate value to its members and secure their ongoing in-kind commitment. The Spanish coordinator was frank about this challenge, noting that the government "has not answered to any legislative involvement" and that there is a "fear to participate from the side of the government." This reluctance of public authorities to formally engage with and support the FECT is the most significant threat to its long-term sustainability. The challenge will be to maintain this momentum and relevance as the driving force of the PANTOUR project fades.

3.3. Netherlands

Coordinating entity

CELTH (Centre of Expertise Leisure, Tourism & Hospitality), with Breda University of Applied Sciences (BUas) in a leading advisory role. The Hospitality Pact core governance group is guided by two experienced external consultants.

Overview and governance

The Hospitality Pact in the Netherlands offers a third and highly distinctive model: an agile, project-focused model specifically designed to avoid the "talking group" trap that afflicts many multi-stakeholder partnerships. The partnership, coordinated by Breda University of Applied Sciences (BUas) and the Centre of Expertise Leisure, Tourism and Hospitality (CELTH), operates on a simple but powerful principle: commit to delivering one tangible, co-funded pilot project each year, ensuring that its activities are always output-oriented and that stakeholders always have a concrete reason to remain engaged.

It is important to note that the Netherlands actually operates two distinct but complementary partnerships: the Landelijk Overleg Toerisme Management (LOTM), which focuses on educational providers, and the Hospitality Pact, which focuses on the broader hospitality industry. This dual structure allows the Netherlands to address both the supply side (education) and the demand side (industry) of the skills equation simultaneously.

The Hospitality Pact is a relatively new structure, having been formally launched and signed in April 2023 as initiative and kicked off in September 2025 in a research pilot. However, it builds on years of preparatory work and relationship-building within the Dutch hospitality sector, and its first major output, the

Hospitality Labour Market Monitor, was already completed before the end of 2025 and will be published in April 2026.

Membership composition

Category	Number core members	Number affiliate members	Total
Tourism Industry	7	26	33
Public Authorities	1	1	3
Education and Training Providers	4	0	4
Total	12	27	40

The core governance group is the active decision-making body. It includes major industry associations (Koninklijke Horeca Nederland, HISWA-RECRON, Reiswerk, CLC VECTA, FNV Horecabond), one public authority (Ministry of Economic Affairs and Climate), and four education/training providers (CELTH/BUAs, NHL Stenden, Hogeschool Zeeland, MBO Raad).

The Ontdek Hospitality affiliate members are predominantly individual companies (Heineken, Hilton, McDonald's, Accor, Coca-Cola, Efteling, etc.) who contribute financially but do not sit on the governance board.

The "full circle" philosophy

The Hospitality Pact's approach is built on what its coordinator describes as a "full circle" philosophy: industry stakeholders identify a practical problem or question; associations translate this into a strategic planning challenge; the NRSP commissions research to analyse it; associations provide budgets (co-funding principle); CELTH executes the research; the Hospitality Pact facilitates an annual event to present the findings; associations invite their strategic boards for implementation; and the findings are discussed again in the working group to identify the next question. This model is a powerful antidote to the "talking group"

trap, ensuring that the partnership's activities are always demand-driven, output-oriented, and financially sustainable.

This circular model has several important advantages. It ensures that research is always demand-driven, addressing questions that industry stakeholders actually care about. It creates a strong sense of ownership among participants, who have co-funded the research and are therefore invested in its outcomes. It provides a clear and predictable annual rhythm, making it easy for stakeholders to plan their participation. And it ensures that the NRSP always has a concrete, tangible output to show for its work.

The Hospitality Labour Market Monitor

The flagship output of the Hospitality Pact's first pilot year is the Hospitality Labour Market Monitor, a comprehensive annual report on workforce trends in the Dutch hospitality sector. The Monitor combines quantitative data (from labour market statistics, job vacancy analyses, and employer surveys) with qualitative interviews with industry leaders to provide a nuanced, evidence-based picture of the sector's skills challenges and opportunities. Its key findings for the Dutch context include a critical shortage of workers with high empathy skills (to support the increasing use of technology), a need for "people learning" rather than just "system learning," and a growing demand for workers who can create meaningful experiences for guests rather than simply executing efficient processes. For younger workers specifically, the Monitor identified gaps in basic professional skills such as handling telephone calls, managing conflict situations, reading body language, and navigating difficult conversations.

The pilot-based model

The Netherlands is characterised as a "pilot-based" model for several specific reasons that distinguish it from the other NRSPs in the network. First, the Hospitality Labour Market Monitor itself was launched as a formal research pilot in September 2025, with a defined scope, timeline, and evaluation framework.

Second, the partnership's operational model is explicitly built around annual pilot projects, rather than ongoing coordination activities. Third, the co-funding principle, where industry partners match contributions for specific projects, means that each activity is, in effect, a funded pilot with a clear business case. Fourth, the partnership has been deliberately designed to be scalable and replicable, with the intention of expanding to other regions of the Netherlands and potentially to other countries. This pilot-based approach reflects a pragmatic and evidence-driven philosophy: test, learn, and scale what works, rather than committing to a fixed structure in advance.

Sustainability assessment

The Hospitality Pact's sustainability model is arguably the most innovative in the network. By embedding a co-funding principle into its governance structure, it has created a financial model that is not dependent on external project funding or government grants. The partnership's sustainability is therefore linked to its ability to continue delivering research and intelligence that industry stakeholders are willing to co-fund. The coordinator expressed confidence in this model, noting that the partnership is "actively pursuing additional external fund applications for 2026." The main challenge is the administrative overhead required to secure funding and manage projects year after year, which places a significant burden on the coordinating team.

3.4. Hungary

Coordinating entity

VIMOSZ (Association of Hungarian Travel Agencies and Tour Operators) maintains and coordinates the National Competence and Skills Development Alliance (Nemzeti Kompetencia és Készségfejlesztési Szövetség- NKCS).

Overview and governance

The Hungarian NRSP, coordinated by VIMOSZ, represents a hybrid model that combines elements of both the industry-led and academic-led approaches. With 22 member organisations, including 16 from the tourism industry, five (5) from education and training, and (one) 1 from public authorities, it has achieved a relatively balanced stakeholder composition, though the absence of relevant government ministries remains a challenge.

The VIMOSZ NRSP was established in 2022 and has grown steadily during the project period, adding five (5) new members since its founding. It has developed a formal governance structure, including a signed MoU for all members, and has held seven (7) meetings in the most recent reporting period. The partnership has also developed a dedicated website and newsletter, making it one of the more visible NRSPs in the network.

Membership composition

Category	Number
Tourism Industry	16
Public Authorities	1
Education and Training Providers	5
Total	22

The tourism industry members represent the entire vertical of tourism and hospitality training, and the most important professional associations are also represented.

Key activities and achievements

Hungary's most significant achievement has been the launch of a national digital skills development project specifically targeting micro and small tourism

businesses. This project is a direct outcome of the NRSP's intelligence work and demonstrates the partnership's ability to secure funding and deliver practical, high-impact training at scale. This project, which provides practical, accessible training in digital tools and technologies, directly addresses one of the key skills gaps identified through the NRSP's intelligence work. It also demonstrates the NRSP's ability to move from identification to action, a transition that many NRSPs struggle to make.

The Hungarian NRSP has also been active in piloting the training programmes developed within the PANTOUR project, providing structured feedback on their relevance and effectiveness in the Hungarian context. The partnership's SWOT analysis, conducted as part of the April 2024 reporting, identified three priority skills gaps: data analytics and decision-making, environmental tourism policy-making, and change and adaptability. These findings have informed the development of the NRSP's activity plan and its advocacy with public authorities.

Sustainability assessment

Hungary expressed the highest confidence in its long-term sustainability among the non-institutionally funded NRSPs, primarily due to the launch of the national digital skills project, which provides a financial basis for NRSP activities. The coordinator's advice to other NRSPs ("Don't let difficulties stop you: members need to be constantly motivated") reflects a pragmatic and resilient approach to the challenges of operating a voluntary partnership.

3.5. Greece

Coordinating entity

University of the Aegean – iTED Lab.

Overview and governance

The Greek NRSP, coordinated by the University of the Aegean, represents an academic-led model in which a higher education institution plays the central role in convening and coordinating the partnership. This model has both strengths and weaknesses: the academic coordinator brings research expertise, credibility, and a long-term perspective, but may lack the industry connections and commercial orientation needed to drive rapid, practical change.

The Aegean NRSP has focused its work on building a representative and engaged stakeholder group, with a particular emphasis on ensuring that participants are "selected from a pool of familiar individuals characterised by cooperativeness and genuine interest." This approach has helped to create a cohesive and productive group, though the coordinator acknowledged the challenge of "industry reluctance to invest time without financial return."

Membership composition

The group was launched with 13 initial members, all of whom have signed a Memorandum of Understanding (with one more major partner pending).

Category	Number
Tourism Industry	7
Public Authorities	2
Education and Training Providers	4
Total	13

The complete absence of the public sector is a significant structural weakness. The tourism industry members represent the entire vertical of tourism and hospitality training, and the most important professional associations are also represented.

Key activities and achievements

The most significant achievement of the Greek NRSP has been its contribution to policy influence. This is a powerful example of an NRSP fulfilling its potential as a strategic advisory body, shaping national policy from the bottom up. Members of the Aegean NRSP were invited to participate in the Ministry of Tourism's committee for the reform of tourism education, providing direct input into national policy-making. This represents a concrete example of an NRSP fulfilling its potential as a "Think Tank" that supports central decision-making on education, training, and skills development. The coordinator articulated this vision clearly: "NRSPs should have an institutionalised form and operate as a 'think tank' that supports central decision-making on education, training, and skills development across tourism sectors."

The Greek NRSP has also focused on gathering intelligence on digital skills, particularly the impact of artificial intelligence on tourism employment, through employer roundtables and skills surveys. This focus on AI and its implications for the tourism workforce is timely and forward-looking, positioning the NRSP as a relevant voice in an increasingly important policy debate.

Sustainability assessment

The Greek NRSP faces significant sustainability challenges, operating on a fully voluntary basis with no dedicated budget. The insufficient government engagement/support and the bureaucratic/administrative obstacles represent the most significant barriers to progress. The top priority for improving sustainability is "institutional recognition/mandate from government", a formal acknowledgement that the NRSP is the go-to advisory body on tourism skills in

Greece. Without this recognition, the partnership risks remaining a valuable but informal discussion forum, unable to translate its insights into binding policy recommendations.

3.6. Finland

Coordinating entities 2022-2024 – Phase 1

Two state-coordinated bodies:

- 1 Finnish National Agency for Education (coordinates the National Competence Forum)
- 2 Ministry of Economic Affairs and Employment (coordinates the Occupational Barometer and the National Tourism Forum)

Coordinating entity since 2025 – Phase 2

- 1 Following the cessation of the National Competence Forum at the end of 2025, the partnership was reconstituted under new leadership: The Finnish Hospitality Association, MaRa, the leading trade and labour market association for the hospitality industry in Finland.

Overview and governance

The Finnish NRSP has undergone the most significant transformation in the network, demonstrating both the challenges of sustaining academic-led partnerships and the resilience of the model when a strong industry body takes ownership.

The primary mission was to align PANTOUR's objectives with Finland's established national skills forecasting and tourism development mechanisms. The National Competence Forum focused on long-term (5–20 years) forecasting

of competence needs through scenario analysis, while the National Tourism Forum served as the central advisory body for the national tourism strategy. The goal was to share information, enrich data and insights, and avoid duplicating efforts.

As the new NRSP, MaRa represents the interests of the Finnish hospitality and tourism sector. Its mission is to actively contribute to skills development and workforce competence by aligning national skills needs with European-level initiatives. Within PANTOUR, MaRa supports this mission through its internal education committee, ensuring project activities are effectively integrated with industry priorities. This move marks a pivotal shift from a governmental-led to a robust industry-led model.

Membership composition

Both forums were extensive and deeply embedded in the national administrative and economic fabric. The tourism working group of the National Competence Forum alone has approximately 25 members, including representatives from employers' organisations, trade unions, VET providers, universities, and national agencies. The National Tourism Forum has over 60 members, including representatives from all relevant ministries, major tourism companies (Finnair, Scandic Hotels, Viking Line), regional councils, and national agencies.

Under its new industry leadership (MaRa), the NRSP was rebuilt with 31 members. This includes major national players like Lapland Hotels & Safaris, Scandic Hotels, Sodexo, and Compass Group, alongside key educational institutions. MaRa's extensive network provides a strong and direct link to employers' needs across the country.

Key activities and achievements

The new activity plan, agreed with MaRa, focuses on the practical dissemination of PANTOUR outputs, including the training book and Skills Lab, directly to its extensive network of member companies. The partnership now leverages MaRa's established communication channels (website, events) to ensure the project's results have a direct and lasting impact. MaRa members have actively participated in project seminars, interviews, and the piloting of project outputs. Finland has also developed an innovative approach to industry engagement: offering small time slots within NRSP meetings for private companies to "advertise" their services (5 minutes). This simple but effective incentive has helped to motivate and maintain industry participation in a context where time and resources are scarce.

The Finnish NRSP has also been notable for its long-term perspective on skills forecasting. Unlike some NRSPs that focus primarily on immediate skills gaps, Finland has engaged with the question of what skills will be needed in 5, 10, and even 20 years, drawing on the expertise of the National Competence Forum and other forward-looking bodies.

Sustainability assessment

The transition to MaRa's leadership directly addresses the core sustainability challenge identified by the previous governmental model: the lack of dedicated resources and the difficulty of translating universal ideas into action for time-poor SMEs. By embedding the NRSP within a powerful industry association, the partnership now has a direct channel to the businesses it aims to serve and a more sustainable operational foundation. The key challenge moving forward is to maintain the active engagement of its high-level members, whose time is limited, and to deliver on the promise of practical, industry-relevant skills solutions.

3.7. Italy

Coordinating entity

UNIONCAMERE (Union of Italian Chambers of Commerce) is the coordinating entity of the NSG Italia. FEDERTURISMO, the Italian PANTOUR project partner, supports UNIONCAMERE in its coordination activity and leads one of the internal working groups (dedicated to "Toolkit testing").

Overview and governance

Italy's National Skills Group (NSG Italia) represents a distinctive governance model in the NRSP network: one coordinated by a Chamber of Commerce body (UNIONCAMERE) rather than a tourism industry association, public authority, or academic institution. This model reflects the specific institutional landscape of Italy, where the Chamber of Commerce system plays a central role in supporting businesses and facilitating dialogue between the private sector and public institutions.

UNIONCAMERE is the coordinating entity of NSG Italia, while Federturismo Confindustria, the Italian PANTOUR project partner, supports UNIONCAMERE in its coordination activity and leads one of the four internal working groups (dedicated to toolkit testing). This dual leadership structure reflects the complementary roles of the two organisations: UNIONCAMERE provides institutional legitimacy and coordination capacity, while Federturismo provides sector-specific expertise and industry connections.

NSG Italia has 21 participating organisations, with a composition that is notably weighted towards education and training providers (11 organisations) and public authorities (five -5- organisations, including three regional Chambers of

Commerce), with five (5) from the tourism industry. Four new members joined in 2023 (Libera Università di Bolzano, Federalberghi, Re.Na.I.A., and FIPE), and six (6) further organisations have expressed interest in joining, indicating a growing momentum. However, the real participation to the activities is nowadays limited.

Membership composition

The partnership has 21 organisations:

Category	Number
Tourism Industry	5
Public Authorities	5
Education and Training Providers	11
Total	21

A further six (6) organisations have expressed interest in joining, including ANPAL Servizi, LUISS, Regione Emilia Romagna, Regione Toscana, Università di Torino, and Fondazione ITS Academy Turismo Veneto.

Internal organisation and working groups

At the beginning of its foundation, the NSG Italia has developed a structured internal governance framework, with four internal thematic working groups, each with a designated leader. This structure is a key strength, providing a clear division of labour and ensuring that all key areas of NRSP activity are covered.

The first thematic group, led by FTO (the Italian Tour Operators Federation), is responsible for **events and communication**, covering the development and implementation of the NSG's communication strategy, the organisation of events, and the development of digital communication tools. The second, led by Federturismo, focuses on **toolkit testing**, evaluating the PANTOUR project's tools

and methodologies, including the SSIM, the occupational profiles, and the training courses. The third group, led by the University of Pisa, is dedicated to **skills matrix and skills intelligence** work, with responsibility for developing a national skills matrix for the tourism sector. The fourth and final group, led by UNIONCAMERE, addresses the **certification of competences and skills**, exploring pathways for the formal recognition and certification of the skills identified through the NRSP's intelligence activities.

This four-pillar structure ensured that all key dimensions of NRSP activity were covered and that each working group had a clear mandate and a designated leader accountable for its outputs. However, over the years, this structure has lost its applicability and, as of today, the Italian NSG work on demand-driven requests rather than following this originally structured approach.

Key activities and achievements

The Italian NSG has been active on multiple fronts during the PANTOUR project period. Its most significant activities include:

Toolkit testing and validation: The Toolkit testing working group, led by Federturismo, has conducted a systematic evaluation of the PANTOUR project's outputs. The December 2023 meeting of the NSG was specifically dedicated to the experimentation of the PANTOUR toolkit, with participants providing feedback on its usability and relevance in the Italian context. The June 2024 meeting continued this work, focusing on the practical application of the occupational profiles.

SSIM Focus Group (September 2025): In September 2025, NSG Italia conducted a dedicated focus group on the Strategic Skills Intelligence Model (SSIM), bringing together representatives from across the partnership to evaluate the model's applicability to the Italian tourism sector. The focus group provided detailed feedback on the model's strengths and the adaptations needed for the Italian

context. The results are documented in the SSIM Focus Group Synthetic Report and have been incorporated into the final version of the SSIM.

Skills Matrix development: The Skills Matrix working group, led by the University of Pisa, has been developing a comprehensive national skills matrix for the Italian tourism sector. This matrix, which maps the skills required for different occupational profiles across the sector, provides a structured framework for identifying and tracking skills needs over time.

SWOT analysis

The April 2024 report for Italy included a detailed SWOT analysis, which provides a clear picture of the partnership's strengths, weaknesses, opportunities, and threats:

Strengths: Clear and defined partnership structure; effective organisation of planned activities; proactive participation by stakeholders; balanced representation of the Italian national territory.

Weaknesses: Absence of relevant national ministries (Tourism, Education, University, Labour); presence of only one region (Lombardy) as a full member, though two others (Emilia Romagna and Tuscany) have expressed interest; meetings held exclusively online until recently; lack of financial and human resources dedicated full-time to the partnership.

Opportunities: Opportunity to occupy an important "operational space" that is currently unmanned in Italy; possibility of launching Regional Skills Groups as more regions join; potential for a constant and constructive dialogue between tourism businesses, education, and public authorities.

Threats: Persistent difficulties in involving the Italian public administration in constructive dialogue with the business world; risk of duplication and overlap with similar initiatives; risk of progressive decline without a dedicated budget as the driving force of the PANTOUR project fades.

Sustainability assessment

Italy faces the same fundamental sustainability challenge as most other NRSPs: the absence of a dedicated budget and the reliance on voluntary contributions. The threat identified in the April 2024 report, that activities may "progressively decrease" without a specific budget, is a realistic concern.

In addition, without the active involvement of the relevant national ministries, particularly the Ministry of Tourism and the Ministry of Education, as active participants in the partnership, the NSG's ability to translate its recommendations into binding policy changes will remain limited.

3.8. Bulgaria

Coordinating entity

Zangador Research Institute (ZRI).

Overview and governance

The Bulgarian National Skills Group (NSG Bulgaria), coordinated by the Zangador Research Institute (ZRI), represents an emerging model at an earlier stage of development than most other NRSPs in the network. Work on the Bulgarian NRSP had begun under the NTG project, where it was coordinated by Varna University of Management. The transition to ZRI as the coordinating entity reflects the project's end and the need for a new institutional home for the partnership.

NSG Bulgaria has expanded to 20 member organisations, with a composition that includes 12 from the tourism industry, seven (7) from education and training, and one (1) from the public authorities sector. The partnership has also secured one affiliated member (Top Rent a car). While public authority representation has slightly improved, it remains a governance weakness of the Bulgarian NRSP. The

membership includes a diverse range of tourism businesses, from tour operators and hotels to attractions and food and beverage providers, as well as several universities and training institutions.

Membership composition

The group has 20 members, representing a broad range of organisations:

Category	Number
Tourism Industry	12
Public Authorities	1
Education and Training Providers	7
Total	20

Key activities and achievements

The Bulgarian NSG has held a total of four (4) online and eight (8) in-person meetings, often leveraging major tourism events for face-to-face interactions. The SWOT analysis in the April 2024 report identifies the pre-existing relationships between members as a key strength, facilitating "smooth communication and closer informal contacts." All members accepted a Memorandum of Understanding to formally join the group. Two Facebook groups ("Education and Training in Tourism" and "Bulgarian Tourism Academics") serve as online forums for discussions and dissemination of information.

Between April 2024 and February 2026, the NRSP's activities have focused heavily on piloting training programmes and evaluating PANTOUR deliverables. Key achievements include:

- Training and piloting: Implementation of multiple pilot trainings, including digital skills sessions in 2024, and planned 2025 trainings on Digital Content Creation, Environmental Management, and Crisis Management.

- Feedback on project outputs: Members actively provided feedback on core PANTOUR deliverables, including the Handbook on New Occupational Profiles, the Skills Strategy, and the Skills Lab.
- Skills intelligence: Active participation by most members in the primary research of skills needs and the updated SSIM piloting.
- Event participation: Members regularly participate in professional events to discuss education and training in Bulgarian tourism, including the Tour Expo Destination Varna, the Hotel Investment Forum in Sofia, and the Black Sea Tourism Forum.

SWOT analysis

The 2024 report for Bulgaria included a SWOT analysis that highlights the key challenges and opportunities facing the partnership:

Strengths: Representation of stakeholders from all tourism subsectors; members know each other well, facilitating smooth communication and informal contacts.

Weaknesses: Only one public institution; physical distance makes face-to-face meetings difficult; lack of formal legal status and authority decreases motivation and hinders attraction of new members.

Opportunities: Enlarged network through PANTOUR activities; training among guest houses and family hotels as a pathway to attract more micro and nano enterprises.

Threats: Severe lack of personnel in hospitality has shifted focus from training to recruitment; risk of duplication and overlap with other national and regional projects.

Sustainability assessment

The sustainability assessment of the Bulgarian National/Regional Skills Partnership (NRSP) for tourism skills intelligence shows that, while the group is

useful, it faces several challenges. It brings together different stakeholders and helps discuss and review project results, including those from Pantour, but it is difficult to keep members actively involved. Meetings are hard to organise, as participation is voluntary and many members do not attend regularly. Most discussions take place during tourism events or through informal online channels such as social media groups, which limits focused and consistent work. In addition, stakeholder motivation is weakened by the limited translation of collective inputs into formalised policies, state standards, or educational frameworks, reducing the perceived impact of engagement.

3.9. Ireland

Coordinating entity

The COG has no single permanent coordinating entity. It is a non-statutory body, and the chair position has been held by Fáilte Ireland (the National Tourism Development Authority) but has recently transitioned to a rotating, independent chair. TU Dublin has been the liaison between the COG and the PANTOUR/NTG research community.

Overview and context

The Irish Careers Oversight Group (COG) represents a unique and instructive case in the NRSP network: a pre-existing, well-established structure that became inactive during the PANTOUR project's lifespan, not due to a lack of willingness from the coordinating partner or other stakeholders, but due to the absence of a formal government mandate to nominate an accountable body.

The COG was established well before the PANTOUR project, with TU Dublin reporting 28 meetings since 2016. It had a well-defined mandate, covering career

promotion, employment connections, recruitment and retention, curriculum alignment, and the mapping of existing skills provision. However, following the publication of the Joint Committee on Tourism, Culture, Arts, Sport and Media report in November 2022, which recommended that the government "identify a body accountable for delivering COG's recommendations", the COG entered a period of institutional limbo, waiting for the government to act on this recommendation.

Membership composition

The group has 20 members with a balanced representation:

Category	Number
Tourism Industry	6
Public Authorities	4
Education and Training Providers	10
Total	20

The Government feasibility study

In April 2024, the parent Department engaged the Institute of Public Administration (IPA) to conduct an independent feasibility study to examine the Joint Committee's recommendation. As of February 2026, the outcome of this study had not yet been published. However, the new national tourism policy includes a commitment to "continue the work of the Hospitality and Tourism Careers Oversight Group," providing a degree of policy-level recognition for the COG's mandate.

In the absence of an active COG structure, Fáilte Ireland, the national tourism development authority, has continued to work closely with key bodies across the

wider careers and skills ecosystem, maintaining relationships with COG members and keeping the network alive informally.

Lessons for the NRSP Network

The Irish case provides an important lesson: that even with committed partners, an NRSP cannot function in an institutional vacuum. Government recognition and a clear mandate are not just beneficial; they are often essential. The COG's inactivity is not a failure of the partnership model per se, but a failure of the institutional environment in which it operates. This distinction is important: it suggests that the solution lies not in redesigning the NRSP model, but in advocating more effectively for the institutional recognition and government mandate that the model requires to function.

The Irish case also illustrates the risk of over-dependence on a single institutional champion. When Fáilte Ireland's mandate to chair the COG became unclear, the entire partnership stalled. This points to the importance of building a distributed governance structure in which no single organisation holds a veto over the partnership's ability to function.

3.10. Latvia

Coordinating entity

Riga Planning Region (a public regional authority).

Overview and context

The Latvian Regional Skills Partnership (RSP) was formally launched on 29 April 2025, making it one of the newest partnerships in the network. Coordinated by the Riga Planning Region, it represents a case where a regional public authority, rather than a national body, has taken the lead in establishing a skills governance

structure. The partnership was launched with three founding members, with the intention of expanding its membership in the coming months.

Membership composition

Category	Number
Tourism Industry	1
Public Authorities	1
Education and Training Providers	1
Total	3

The launch was supported by Federturismo (Italy) and EVBB (European Association of Institutes for Vocational Training), demonstrating a successful model of transnational cooperation in fostering new skills partnerships.

Key activities and opportunities

The formal establishment of the RSP is the key achievement to date. As a new partnership, the immediate opportunity is to expand its membership to include a wider range of stakeholders from across the Latvian tourism ecosystem and to define a clear activity plan for its first year of operation. The Latvian RSP also represents a potential model for other countries where a national-level partnership may be difficult to establish, demonstrating that a regional approach can be a viable starting point.

3.11. Moldova

Coordinating entity

The Employer's Association of the Tourism Industry of the Republic of Moldova (APIT) is the coordinating organisation for the partnership. The operational coordination is handled by a Coordination Secretariat hosted by APIT.

Overview and governance

Established in early 2026, the Moldovan partnership is a prime example of a well-structured, industry-led NRSP from its inception. Coordinated by the Employer's Association of the Tourism Industry of the Republic of Moldova (APIT), the partnership was launched with a clear governance framework, a diverse membership base, and a forward-looking roadmap. Its governance structure is composed of a Steering Committee, a Coordination Secretariat, five (5) Thematic Working Groups (covering skills development, education, digital tourism, sustainable tourism, and regional cooperation), and an annual Partnership Assembly.

Membership composition

The partnership was launched with 20 founding members, with a strong industry and regional presence. The engagement of national-level public institutions is planned for a second phase:

Category	Number
Tourism Industry & Associations	6
Tourism Companies	4
Public Authorities	1
Education and Training Providers	4
Development & Socio-economic Partners	1
Regional Partners	5
Total	21

The launch was supported by Federturismo (Italy) and EVBB (European Association of Institutes for Vocational Training), demonstrating a successful model of transnational cooperation in fostering new skills partnerships.

Membership and scope

The partnership began with 20 founding members, showcasing a strong multi-stakeholder representation from the outset. Members include key industry associations, major companies like FlyOne Airlines and Chişinău International Airport, four (4) education and training institutions, and five regional authorities, including the municipalities of Chişinău and Comrat (UTA Gagauzia). A unique feature of the Moldovan NRSP is its explicit focus on macro-regional cooperation, including initiatives that bridge stakeholders from both banks of the Nistru River, leveraging its geographic position to foster skills development and workforce mobility.

Sustainability assessment

The key strength of the Moldova RSP is its industry-driven nature, combined with a clear, multi-layered governance structure and a defined Implementation Roadmap for 2026–2028. This proactive planning provides a solid foundation for sustainability. The primary challenge, common to many NRSPs, will be to successfully engage national-level public institutions (ministries and national tourism authorities), which is planned for a second phase, to ensure long-term policy alignment and institutional support.

3.12. Slovenia

Coordinating entity

Ministry of Labour, Family, Social Affairs and Equal Opportunities.

Overview and governance

The sectoral committee was created in 2024 and it is composed of representatives of social partners, namely: chambers, trade unions, competent ministries, and professional associations.

The sectoral committee proposes the preparation of occupational standards and National Vocational Qualifications (NVQs) in the field of services (including hotel and catering, travel, tourism and leisure, transportation, food technologies, household services, hairdressing and other beauty services, wellness) and appoint a working group of established experts for this task.

Membership composition

Category	Number
Tourism Industry & Associations	7
Education and Training Providers	0
Public Authorities	6
Total	13

Representatives of education and training providers are included in working groups for specific occupational standards as needed.

Key activities and opportunities

Under Article 14 of the National Vocational Qualifications Act (Official Gazette of the Republic of Slovenia No. 1/2007), the Sectoral Committees for Occupational Standards are responsible for considering the merits of initiatives for occupational standards and NVQs, proposing priorities and a methodology for their preparation, appointing working groups to carry out that work, coordinating the contents of occupational standards and NVQs, proposing their revision where necessary, and submitting the finalised occupational standards and NVQs to the expert council of the Republic of Slovenia for VET.

4. CORE ACTIVITIES AND SUCCESS STORIES

This chapter moves from governance models to the concrete activities undertaken by the NRSPs, showcasing how they have translated their mandates into tangible outputs and success stories. It is organised around four core activity areas that are common across the network, with specific examples drawn from the country profiles.

4.1. Skills intelligence

The shift from anecdotal to evidence-based skills intelligence is the most significant contribution of the NRSP network. This transition is critical for aligning training provision with the dynamic needs of the tourism industry. The SWOT analyses in the April 2024 reports consistently highlight the value of this function. The opportunity to "build a wide network of contacts with public and private actors in the field, create opportunities for a constructive and constant dialogue in relation to skills needs in the tourism sector" was a recurring theme.

One of the most important contributions of the NRSPs has been to transform the way in which skills needs are identified and documented in the tourism sector. Before the establishment of these partnerships, skills intelligence in most countries was largely anecdotal, based on the informal observations of individual employers or the periodic surveys of industry associations. The NRSPs have begun to change this, developing more systematic, evidence-based approaches to skills intelligence that provide a more reliable and actionable picture of the sector's needs.

The Netherlands' Hospitality Labour Market Monitor represents the gold standard in this regard. It is a concrete manifestation of the NRSP's role as a mechanism to "reinvent and renew skills intelligence and labour market monitoring" (PANTOUR Project, 2024). Combining quantitative data from labour market statistics and job vacancy analyses with qualitative interviews with industry leaders, the Monitor provides a nuanced, multi-dimensional picture of workforce trends. Its findings, including the critical importance of high empathy skills, the need for "people learning" rather than "system learning," and the specific gaps in basic professional skills among younger workers, are directly actionable by both employers and training providers.

Portugal's national Labour Market Study (Costa, Malta & Martins, 2023), commissioned by the CNFT and conducted by the University of Aveiro, provides a similar evidence base at the national level. The study, first published in 2023 and currently being updated, provides a comprehensive analysis of the skills needs of the Portuguese tourism sector, broken down by region, sub-sector, and occupational profile. Its findings have directly informed the development of national training programmes.

Finland's approach to skills intelligence is more focused and qualitative, built around a series of targeted seminars that bring together employers, educators, and policymakers to discuss specific skills challenges. While less comprehensive than the Dutch or Portuguese approaches, this model has the advantage of being highly accessible and actionable: each seminar is designed to generate 1-5 concrete takeaways that participants can act on immediately.

Italy's NSG has been developing a national skills matrix through its Skills Matrix and Skills Intelligence working group, led by the University of Pisa. This matrix, which maps the skills required for different occupational profiles across the Italian tourism sector, provides a structured framework for identifying and tracking skills needs over time. The matrix is designed to be updated regularly, ensuring that it remains relevant as the sector evolves.

Greece has focused its intelligence work on digital skills, particularly the impact of artificial intelligence on tourism employment. Through employer roundtables and skills surveys, the Aegean NRSP has gathered evidence on the specific AI-related skills gaps facing the Greek tourism sector, including the need for workers who can work effectively alongside AI tools and who can manage the human dimensions of service delivery in an increasingly automated environment.

Hungary's intelligence work has identified three priority skills gaps: data analytics and decision-making, environmental tourism policy-making, and change and adaptability. These findings have informed the development of the NRSP's activity plan and its advocacy with public authorities, particularly in relation to the national digital skills development project.

4.2. Piloting and quality assurance

The NRSPs have provided an essential 'real-world' laboratory for testing and refining the tools developed within the PANTOUR project. This feedback loop has been crucial for ensuring the practical applicability and relevance of the project's outputs.

A critical and distinctive role of the NRSPs within the PANTOUR project has been to serve as a European testbed for the tools and methodologies developed by the project team. This quality assurance function has been essential in ensuring that the project's outputs are fit for purpose and relevant to the diverse contexts of the European tourism sector.

Spain's FECT has been the most comprehensive tester of PANTOUR outputs, evaluating all major tools and methodologies including the Skills Lab, the new occupational profiles, the green, social, and digital skills training courses, and the SSIM. This systematic validation work has provided the project team with invaluable feedback on the usability, relevance, and effectiveness of its outputs,

and has ensured that the final versions of these tools reflect the real-world needs and constraints of the tourism sector.

The Netherlands tested the SSIM and the new occupational profiles, providing feedback that was particularly valuable given the Dutch context of a highly developed and data-rich labour market. The Dutch experience with the SSIM informed the development of the model's quantitative components, ensuring that it could be effectively integrated with existing labour market data sources.

Italy conducted a dedicated focus group on the SSIM in September 2025, bringing together representatives from across NSG Italia to evaluate the model's applicability to the Italian context. The focus group identified several strengths of the SSIM, including its structured approach to skills identification and its ability to facilitate dialogue between different stakeholder groups, as well as several adaptations needed for the Italian context, including a greater emphasis on the role of public authorities in the skills intelligence process and a more explicit connection to the Italian national qualifications' framework.

Hungary focused on piloting the PANTOUR-developed training programmes with local businesses, providing feedback on their relevance, accessibility, and effectiveness in the Hungarian context. This piloting work has been particularly valuable for the green and digital skills training courses, which required adaptation to reflect the specific regulatory and technological environment of the Hungarian tourism sector.

4.3. Training delivery and workforce development

While not all NRSPs have the mandate or resources to deliver training directly, the most mature partnerships have demonstrated a clear ability to influence and facilitate workforce development initiatives. This is where the intelligence gathered in Scope 2 activities is translated into tangible impact on the ground.

The ultimate goal of skills intelligence is to inform the development and delivery of relevant and effective training. The most mature NRSPs have successfully closed this loop, translating their intelligence work into concrete training programmes that have reached thousands of workers across the sector.

Portugal's CNFT has been the most prolific in this regard, with two major national training programmes directly informed by the NRSP's work. "Formação + Próxima" (Training Closer to Companies) brings training provision directly to tourism businesses, reducing the barriers of time and distance that prevent many SME employees from accessing traditional training. "Integrar para o Turismo" addresses the specific skills needs of migrants entering the tourism workforce, providing language and sector-specific training that supports their integration and career development. Portugal has also developed a Digital Academy, providing online training in digital skills for tourism professionals across the country.

Hungary has taken concrete steps to address the digital skills agenda, with VIMOSZ engaging directly with the Ministry of Culture and Innovation and the Innovation Council for VET to advocate for the development of accessible, practical training solutions for micro and small tourism businesses. This engagement reflects a shared recognition of the implementation gap identified by the Finnish NRSP (the challenge of making skills development accessible and

actionable for SMEs) by providing "turn-key solutions" that businesses can implement immediately.

Spain has piloted the PANTOUR training courses with members of the FECT, providing structured feedback on their relevance and effectiveness. The piloting process has also served as a valuable dissemination mechanism, introducing the PANTOUR project's outputs to a wide audience of Spanish tourism professionals.

Italy's Certification of Competences working group, led by UNIONCAMERE, has been exploring pathways for the formal recognition and certification of the skills identified through the NSG's intelligence work. This work is particularly important in the Italian context, where the formal recognition of skills by public authorities is a prerequisite for their inclusion in national qualifications frameworks and for their use as a basis for hiring and promotion decisions.

4.4. Policy influence and institutional advocacy

The ultimate measure of an NRSP's success is its ability to influence policy and drive systemic change. This is the most challenging aspect of their work, but also the one with the greatest potential for long-term impact. In certain contexts, in case of lack of public sector participation, effective changes are difficult to register in training topics.

The most successful have begun to function as influential advisory bodies, shaping regional and national skills policy. This policy influence role is arguably the most important long-term contribution of the NRSPs, as it has the potential to create systemic change that goes far beyond the reach of any individual training programme.

Greece's Aegean NRSP has achieved the most direct policy impact, with members participating in the Ministry of Tourism's committee for the reform of tourism education. This direct involvement in national policy-making represents a concrete realisation of the NRSP's potential as a "Think Tank" that supports

central decision-making. The Greek coordinator's vision, that NRSPs should "have an institutionalised form and operate as a 'think tank' that supports central decision-making on education, training, and skills development across tourism sectors", is already being realised in Greece.

Portugal's CNFT is intrinsically linked to the national tourism strategy, ensuring that skills development is a central pillar of the country's competitiveness agenda. The CNFT's work is not merely advisory; it is embedded in the institutional machinery of the Portuguese tourism sector, with direct lines of influence to the Ministry of Tourism and to the national qualifications framework.

Spain's FECT is actively advocating for greater government engagement and the formal adoption of its recommendations into the national qualifications framework. While this advocacy has not yet resulted in formal legislative change, the FECT's visibility and credibility within the Spanish tourism sector give it a strong platform from which to continue this work.

Italy's NSG recognises that without the involvement of the relevant national ministries as active participants, the NSG's ability to translate its recommendations into binding policy changes will remain limited.

4.5. Communication and dissemination

Effective communication is essential for building and maintaining a vibrant partnership. It is the mechanism through which NRSPs build their brand, disseminate their findings, and attract new members.

All NRSPs have engaged in communication and dissemination activities, though the level of sophistication and ambition varies considerably. The most effective communication strategies have been those that leverage existing platforms and networks, rather than attempting to build new ones from scratch.

Spain's use of the Thinktur platform (<https://www.thinktur.org/>) is the most successful example of this approach. Thinktur is a well-established digital hub for

tourism innovation and knowledge, with a large and engaged audience of industry professionals and policymakers. By channelling its communication through Thinktur, the FECT has been able to reach a far wider audience than it could have achieved through a standalone NRSP website or newsletter.

Hungary's development of a dedicated NRSP website and newsletter represents a more resource-intensive approach, but one that has the advantage of providing a distinct identity and brand for the partnership. The website serves as a repository for the NRSP's publications, reports, and news, providing a permanent and accessible record of its work.

Italy's Events and Communication working group has been developing a communication strategy that includes both digital tools (newsletter, social media) and in-person events. The June 2024 meeting discussed specific plans for a national event to disseminate the results of the PANTOUR project, which would serve both as a communication vehicle and as a platform for engaging new members and partners.

The Netherlands' annual Hospitality Pact event, at which the findings of the Labour Market Monitor are presented and discussed, is an excellent example of how a single, well-designed event can serve multiple communication and engagement purposes simultaneously: disseminating research findings, convening industry leaders, and reinforcing the partnership's brand and value proposition.

5. THE SUSTAINABILITY CHALLENGE: CRITICAL BARRIERS

The long-term sustainability of the NRSP network faces several critical and interconnected barriers. These challenges represent the most significant risks to the lasting impact of this project output.

5.1. Resource reality

The most universal and fundamental challenge facing the NRSP network is the stark resource reality. As confirmed by the monitoring data and the qualitative feedback, the overwhelming majority of NRSPs operate on a fully voluntary basis with no dedicated budget for coordination or activities. This means that the time invested by coordinators, the venues for meetings, the resources for research, and the capacity for communication are all provided voluntarily, without financial compensation.

This reliance on goodwill and in-kind contributions is not a sustainable model. The April 2024 summary of reports identifies this as a primary weakness across the network, noting that the "lack of human and financial resources may hinder the continuation of activities as the NRSPs are on a voluntary basis." The Finnish coordinator articulated this challenge with characteristic directness⁵:

⁵ See April 2024 Country Reports on NRSP operational status, reproduced in Appendix E.

"It's not about the need or importance of the subject, it's about peoples' time and resources."

This sentiment was echoed by partners in Greece, Spain, Hungary, and Italy. The Italian NSG's April 2024 report identified *"the lack of financial and human resources dedicated full-time to the development of all the opportunities that an NRSP could potentially seize"* as a key weakness, and warned that *"without a specific budget available and with the progressive fading of the strong driving force currently provided by the Pact for Skills in Tourism and by the PANTOUR project, the activities of the Italian NSP may progressively decrease."*

Without a stable funding source, NRSPs struggle to move beyond basic coordination and implement ambitious projects. This creates a vicious cycle: without resources, they cannot deliver high-value outputs; without those outputs, they struggle to make a compelling case for funding; and without funding, they remain dependent on the goodwill of their members, which is inherently fragile.

5.2. The "Talking Group" trap

"Without a clear research agenda or activity plan, the NRSP will remain a 'talking group' wasting hours of precious time and no advancement for the real target group: SMEs." (Dutch NRSP Coordinator, February 2026).

Directly linked to the resource challenge is the risk of falling into what the Dutch coordinator memorably described as the "talking group" trap. Without a clear activity plan and tangible annual outputs, an NRSP can quickly become a passive discussion forum, leading to stakeholder disengagement and, ultimately, to the partnership's collapse.

"Without a clear research agenda or activity plan, the NRSP will remain a 'talking group' wasting hours of precious time and no advancement for the real target group: SMEs."

This warning reflects a deep understanding of the dynamics of voluntary multi-stakeholder partnerships. Stakeholders, particularly from the private sector, will only remain engaged if they see a clear return on their investment of time. If meetings are perceived as talking shops with no concrete outcomes, participation will decline, and the partnership will lose the critical mass needed to function effectively.

The Dutch model (one pilot, one project, one publication per year) is the most effective antidote to the talking group trap. By committing to a specific, tangible output each year, the Hospitality Pact ensures that its members always have a concrete reason to participate and a clear deliverable to point to. The Spanish FECT has adopted a similar approach, using the validation and dissemination of PANTOUR outputs as a mechanism for maintaining engagement and demonstrating value.

5.3. The government engagement gap

"As long as the European Commission doesn't demand a more active involvement of the Member States... the implementation of the 'dual-track PfST-NRSPs model' will remain partial and limited." (Summary of reports on current NRSPs, April 2024)⁶.

A third critical barrier is the persistent difficulty of securing consistent and meaningful engagement from public authorities. This challenge manifests in several ways across the network, from outright reluctance to participate to bureaucratic obstacles that slow down decision-making and implementation.

The Spanish NRSP reported a "fear to participate from the side of the government," indicating a potential aversion to the co-ownership of skills challenges. The Greek partnership cited "bureaucratic/administrative obstacles" and the slow pace of public sector decision-making as significant hurdles. The

⁶ See April 2024 Country Reports on NRSP operational status, reproduced in Appendix E.

Italian NSG explicitly noted the absence of relevant national ministries as a key weakness, and the April 2024 summary report warned that "without a concrete participation of the concerned Ministries and without a constructive cooperation with the private sector, the room for manoeuvre remains really restricted⁷."

The Irish case provides the most extreme example of this challenge: the COG's complete inactivity is directly attributable to the government's failure to nominate an accountable body, despite a formal parliamentary committee recommendation to do so. This case powerfully illustrates that even with committed partners, an NRSP cannot function in an institutional vacuum.

The Hungarian coordinator summarised the solution as requiring "persuasion and patience," but this underscores the significant effort required to bridge the gap between the NRSPs and the public authorities they seek to influence.

This is a structural challenge that goes beyond the capacity of individual NRSPs to resolve. It requires action at the European level, specifically, a stronger mandate from the European Commission for Member States to engage with and support their national and regional skills partnerships.

5.4. The implementation gap

"It should be quick and easily accessible. A 'turn-key solution'." (Finnish NRSP Coordinator, February 2026)

A fourth challenge, identified most clearly by the Finnish NRSP, is the gap between the generation of skills intelligence and its translation into accessible, practical training solutions for SMEs. Even when NRSPs successfully identify skills gaps and develop recommendations, these insights often fail to reach the small businesses that need them most.

The Finnish coordinator described this as the "implementation gap":

⁷ See April 2024 Country Reports on NRSP operational status, reproduced in Appendix E.

"No one is saying our stuff isn't valuable. The problem is implementing it. It's so heavy and needs so much orientation that organisations see it as too overwhelming. It should be quick and easily accessible. A 'turn-key solution'."

This observation points to a fundamental tension in the NRSP model: the skills intelligence work that NRSPs do best tends to produce complex, nuanced findings that require significant effort to translate into actionable guidance for SMEs. Small businesses, operating under constant time and resource pressure, need solutions that are simple, practical, and immediately applicable. Bridging this gap requires NRSPs to invest not only in research and intelligence, but also in the curation, packaging, and promotion of training solutions that are specifically designed for the operational realities of micro and small enterprises.

5.5. The structural challenge: activating new NRSPs

Beyond the challenges facing existing NRSPs, the PANTOUR project has also dealt with the difficulty of establishing new partnerships in countries where the conditions for success are not yet in place. Several structural barriers to NRSP activation were identified, including the perception that the Pact for Skills is an "abstract topic," the absence of direct and tangible benefits, the extra workload without compensation, territorial rivalries between organisations, the belief that direct lobbying is sufficient, and concerns about the competitive implications of cooperation.

These findings suggest that the barriers to NRSP establishment are not primarily technical or logistical, but cultural and political. They reflect a broader challenge of building a culture of collaborative skills governance in sectors and countries where such a culture does not yet exist. Overcoming these barriers requires a sustained effort to demonstrate the concrete value of the NRSP model, build trust

between potential partners, and create incentives for participation that outweigh the perceived costs.

The PacTS4ALL D3.2 report on activatability identified the critical importance of finding a "national champion", a well-connected, respected, and motivated organisation that is willing and able to take on the leadership role in establishing and driving the NRSP. Without such a champion, even the most favourable institutional environment may not be sufficient to get a new NRSP off the ground.

6. PATHWAYS TO SUSTAINABILITY: A FRAMEWORK FOR LONG-TERM ROLL-OUT

Overcoming the challenges outlined in Chapter 5 requires a strategic and multi-faceted approach to sustainability. This chapter proposes a framework for long-term roll-out, built on the lessons learnt from the most successful NRSPs and grounded in the evidence gathered throughout the project.

6.1. The value proposition: why stakeholders stay engaged

Understanding the value proposition for each stakeholder group is the cornerstone of a sustainable partnership. The voluntary nature of most NRSPs means that they survive and thrive only as long as their members perceive a clear return on their investment of time and resources. The qualitative feedback from partners provides a clear picture of what this value looks like in practice.

The foundation of any sustainability strategy is a clear and compelling value proposition for each key stakeholder group. The feedback from partners reveals

why they continue to invest their time and resources, even in the absence of direct financial compensation:

For the Tourism Industry: NRSPs offer a unique platform to influence the future talent pipeline, ensuring that vocational and higher education is aligned with real-world business needs. As the Spanish coordinator noted, NRSPs give industry "visibility and networking opportunities" and provide a mechanism for "facilitating activities validated at national level, doing national research, giving visibility to results." The Dutch "full circle" model demonstrates how industry stakeholders can be engaged not just as passive recipients of research, but as active co-funders and co-designers of skills intelligence. The Finnish approach of offering small time slots for companies to "advertise" their services provides a simple but effective incentive for participation.

For Education and Training Providers: Participation in an NRSP allows education and training providers to ensure the relevance of their curricula, gain direct access to industry demand signals, and co-design innovative training solutions. As the Portuguese coordinator noted, the NRSP provides a mechanism for "ensuring skills policies connect to sectoral priorities, business needs, and competitiveness goals." For academic institutions, participation also provides research opportunities, access to industry data, and the ability to demonstrate real-world impact.

For Policymakers and Public Authorities: NRSPs provide a source of reliable, sector-specific data and a mechanism for efficient, coordinated action. The Greek NRSP's participation in the Ministry of Tourism's education reform committee demonstrates how NRSPs can serve as a "Think Tank" that supports central decision-making. For public authorities, the NRSP model offers a cost-effective

way to engage with the private sector and to ensure that public policy is informed by real-world intelligence.

6.2. A three-pillar framework for sustainability

Drawing on the diverse experiences of the twelve NRSPs, a clear framework for sustainability emerges. This framework is not a rigid prescription, but a set of guiding principles that can be adapted to different national and regional contexts. It is built on three interconnected pillars: institutional recognition, diversified funding, and tangible outputs.

Based on the analysis of the twelve NRSPs, a successful sustainability strategy must be built on three interconnected pillars:

Pillar 1: Institutional recognition and formalisation

The most sustainable NRSPs are those that have moved from informal groups to formally recognised bodies with a clear mandate and a distinct identity. This formalisation can take several forms, ranging from the most ambitious to the most immediately achievable.

The most powerful form of institutional recognition is a formal government mandate that designates the NRSP as the official advisory body on tourism skills at the national or regional level. Such a mandate provides the legitimacy needed to influence policy, attract high-level participants, and secure public funding. Portugal's CNFT already benefits from this model, and both Greece and Hungary are actively advocating for it.

Even without a formal government mandate, however, a partnership can substantially enhance its visibility and credibility by establishing a clear name, a distinctive brand identity, and a compelling mission statement. Spain's FECT is the best example of this approach: the Spanish coordinator's first piece of advice

to any new NRSP is simply to "give it a name." A further step towards institutional stability is the formalisation of member commitments through a Memorandum of Understanding, which creates a sense of shared ownership and accountability. Most NRSPs in the network have adopted this approach as a foundational governance measure.

At the most ambitious end of the spectrum, the Greek coordinator's vision of NRSPs as institutionalised Think Tanks that actively support central decision-making represents the long-term aspiration that several partnerships are now working towards — a model in which the NRSP is not merely consulted but is embedded as a permanent, authoritative voice in the national skills governance architecture.

Pillar 2: Diversified and sustainable funding

Moving beyond a reliance on voluntary contributions is essential for long-term sustainability, and the evidence from the network points to several complementary pathways that NRSPs can pursue in combination.

The most innovative model in the network is the Dutch co-funding approach, in which industry partners are required to co-fund specific projects, whether in cash or in kind. This demand-driven model ensures that every project is directly aligned with industry priorities and that stakeholders have a genuine financial stake in its success, making it both sustainable and scalable. Alongside this, several NRSPs have identified national or regional government seed funding as their single most important priority for improving sustainability. Even modest funding, sufficient to cover the basic coordination costs of the partnership, would significantly enhance the capacity and stability of most NRSPs, freeing coordinators from the burden of operating purely on goodwill.

At the European level, registration on the Pact for Skills website as an official Regional Skills Partnership unlocks access to dedicated EU funding opportunities, including the "European Policy Experimentations" funding line specifically

designed to support partnerships of this kind. This route is underutilised by several NRSPs in the network and represents a significant untapped resource. Finally, some partnerships have explored the introduction of modest membership contributions as a means of generating a stable and predictable income stream. While this approach requires careful management to avoid deterring participation, particularly from smaller organisations, it can, if well-designed, reinforce the sense of shared ownership and commitment that is central to a functioning partnership.

Pillar 3: Tangible annual outputs

The most effective way to maintain stakeholder engagement and demonstrate value is to commit to delivering at least one concrete, tangible output every year. The Dutch "one pilot per year" strategy is the best-in-class example of this discipline, but the form that output takes can vary considerably depending on the partnership's capacity, membership, and strategic priorities.

One of the most impactful options is the publication of an annual skills report, drawing on the intelligence gathered through the NRSP's activities, which provides a concrete, citable output that keeps the partnership visible and demonstrates its analytical value to both industry and public authorities. Equally powerful is the organisation of a flagship annual event, such as the Hospitality Pact's annual conference or the Spanish FECT's workshops at FITUR, which creates a focal point for the partnership's work and a platform for disseminating its findings to a wider audience.

For NRSPs with stronger operational capacity, the annual output might take the form of a new training initiative, whether a pilot programme or a new training tool, which provides the most direct demonstration of the partnership's ability to translate skills intelligence into practical action. Alternatively, or in parallel, publishing a formal policy recommendation or position paper on a specific skills challenge provides a structured output that can be used to engage with public

authorities, open doors at ministerial level, and advocate for systemic change. Whichever form it takes, the commitment to a regular, visible output is what distinguishes a functioning partnership from a talking group.

6.3. Linking with EU policy: The Pact for Skills as an accelerator

The Pact for Skills in Tourism (PfST) initiative, launched by the European Commission in December 2021, provides the overarching strategic framework for the work of the NRSPs. The Pact promotes joint action through the establishment and implementation of large-scale skills partnerships at national, regional and local levels. The NRSPs are the primary vehicle for translating the high-level objectives of the Pact into concrete action on the ground.

A critical and currently underutilised pathway to sustainability is formal integration with the EU Pact for Skills. The Pact for Skills is the European Commission's flagship initiative for upskilling and reskilling, and it provides a powerful framework for positioning NRSPs within the broader European skills agenda.

Registration on the Pact for Skills website as an official Regional Skills Partnership offers several concrete advantages:

Enhanced visibility and recognition: Registered partnerships gain official recognition at the European level, increasing their visibility within the Pact for Skills ecosystem and positioning them as credible interlocutors for European institutions.

Access to dedicated funding: Registered partnerships become eligible for specific EU funding lines, including the "European Policy Experimentations — TOPIC 9:

Adult Education: Support to the Regional Skills Partnerships in the Pact for Skills" funding line, which is specifically designed to support the work of Regional Skills Partnerships.

Peer learning and networking: Registration provides access to the Pact for Skills peer learning network, enabling NRSPs to exchange experiences, share best practices, and collaborate with similar partnerships across Europe.

Policy leverage: Formal registration strengthens the NRSPs' position in national policy dialogues, providing a European mandate that can be used to advocate for institutional recognition and government support at the national level.

6.4. Lessons learnt and practical recommendations from the network

The six years of experience accumulated across the NRSP network, from the NTG project through to the conclusion of PANTOUR, have generated a rich body of practical knowledge about what works, what doesn't, and what conditions are needed for an NRSP to thrive. This section distils the most important lessons learnt into actionable guidance for those seeking to establish or strengthen NRSPs.

Lessons for starting an NRSP:

Start with one pilot, one project. The Dutch coordinator's advice is clear: "Make sure to have one pilot, one project or one publication every year. Without a clear agenda, the NRSP remains a 'talking group' wasting hours." Starting with a specific, bounded project, rather than attempting to address all skills challenges simultaneously, provides a clear focus, a tangible deliverable, and a concrete demonstration of value.

Give it a name and a mission. The Spanish experience demonstrates the importance of giving the partnership a formal identity. A clear name, a compelling

mission statement, and a distinctive brand provide a sense of purpose and belonging that helps to attract and retain members.

Start small and focused. The Finnish coordinator's advice ("by organising seminars where one or two issues are covered, aim for 1-5 takeaways, not too overwhelming") reflects the importance of managing the scope and ambition of early activities. Starting with small, focused initiatives that deliver clear value is more effective than attempting to tackle everything at once.

Ensure representative participation. The Greek coordinator's advice ("focus on achieving the most representative possible participation from all sectors and stakeholders") reflects the importance of building a genuinely multi-stakeholder group from the outset. An NRSP that is dominated by a single sector or perspective will struggle to gain the legitimacy and trust needed to influence policy and practice.

Maintain constant motivation. The Hungarian coordinator's advice ("don't let difficulties stop you: members need to be constantly motivated") reflects the reality that sustaining engagement in a voluntary partnership requires ongoing effort. Regular communication, visible outputs, and a sense of shared purpose are all essential tools for maintaining motivation.

Lessons for strengthening existing NRSPs:

Cooperate, it is essential. The Portuguese coordinator's closing message is perhaps the most important lesson of all: "In a context of rapid transformation driven by digitalisation, sustainability challenges, demographic change, and evolving business models, cooperation is no longer optional, it is essential." NRSPs that are embedded in broader networks of cooperation, with other NRSPs, with European institutions, with national policy bodies, are more resilient and more impactful than those that operate in isolation.

Close the implementation gap. The Finnish coordinator's insight about the "implementation gap" (the challenge of translating complex intelligence into

accessible, actionable guidance for SMEs)points to a critical area for improvement. NRSPs that invest in curating, packaging, and promoting "turn-key solutions" for small businesses will have a much greater impact than those that focus solely on research and intelligence.

Pursue institutional recognition. The Greek coordinator's vision of NRSPs as institutionalised "Think Tanks" that support central decision-making represents the most ambitious and most sustainable model for long-term impact. NRSPs that are formally recognised by government as the go-to advisory body on tourism skills have a much stronger platform from which to influence policy and secure resources.

Register with the Pact for Skills. As noted above, registration on the Pact for Skills website is a straightforward and high-impact action that all NRSPs should complete as a matter of priority.

7. CONCLUSIONS AND RECOMMENDATIONS

7.1. Summary of key findings

The evidence presented in this report confirms that the NRSP model is a viable and valuable mechanism for skills governance in the European tourism sector. The network has matured significantly since its inception, with a clear differentiation of governance models and a growing portfolio of tangible outputs. The journey has not been without its challenges, but the overall picture is one of resilience, adaptation, and growing impact.

After four years of implementation under the PANTOUR project, and building on the foundations laid by the preceding NTG project, the NRSP network has demonstrated its value as a flexible, adaptable, and effective model for multi-stakeholder skills governance in the tourism sector. The evidence gathered through this report points to five interconnected findings that together define both the achievements and the unfinished agenda of the NRSP network.

The first and perhaps most important finding is that **the NRSP model works, but context matters**. The twelve partnerships covered in this report have each found a governance approach that reflects the specific institutional, cultural, and economic reality of their country. The Portuguese institutional model, the Spanish industry-led model, the Dutch pilot-based model, the Italian Chamber of Commerce model, and the various academic-led models in Greece, Finland, and Hungary are all valid approaches, each with its own strengths and limitations. There is no single correct answer, and the network's diversity is a feature, not a

flaw. The key is to identify the model best suited to the local context and to build on it with consistency and ambition.

The second finding confirms that **the most mature NRSPs have delivered tangible, high-value outputs**. Portugal's large-scale training programmes, the Netherlands' Labour Market Monitor, Spain's comprehensive validation of PANTOUR outputs, and Greece's contribution to national education reform are all concrete demonstrations that, when given the right conditions, NRSPs can generate real and lasting value for their stakeholders and for the broader tourism ecosystem.

The third finding is less encouraging: **financial sustainability remains the most critical unresolved challenge**. The overwhelming majority of NRSPs operate on a fully voluntary basis, with no dedicated budget and no guaranteed resources beyond the lifespan of the PANTOUR project. This is not a sustainable model, and it represents the most significant structural risk to the long-term viability of the network. Without dedicated financial resources, even the most committed partnerships will struggle to maintain their momentum once the project concludes.

Closely related is the fourth finding, which concerns **the quality of government engagement**. The evidence is unambiguous: the most impactful NRSPs are those that have secured meaningful and sustained involvement from public authorities, while the least impactful are those where government engagement has been absent or superficial. Securing consistent participation from relevant ministries and public agencies is not merely desirable; it is the single most important factor in determining an NRSP's long-term policy influence and systemic impact.

Finally, the fifth finding addresses the question of scale: **the NRSP model is replicable, but activation is difficult**. The successful establishment of new partnerships in Germany, Greece, Latvia, and Moldova demonstrates that the model can take root in diverse contexts. However, each of these cases required

sustained effort, strong local leadership, and a compelling value proposition to overcome institutional inertia. Activating NRSPs in countries where the enabling conditions are not yet in place remains a significant challenge that demands continued investment and targeted support.

7.2. Consolidated recommendations

The findings of this report lead to a series of clear, actionable recommendations for the three key stakeholder groups. These recommendations are designed to address the critical challenges identified in Chapter 5 and to accelerate the long-term roll-out and sustainability of the NRSP network.

Based on the findings summarised above, the following recommendations are proposed for the three key groups of stakeholders:

For NRSP coordinators:

Based on the findings summarised above, the following recommendations are proposed for NRSP coordinators.

The first and most crucial step in moving from an informal working group to a recognised strategic body is to **formalise the partnership's identity**. As the Spanish experience with the FECT demonstrates, giving the partnership a formal name, a clear mission statement, and a distinct brand is a powerful tool for building credibility and attracting members. Establishing a formal governance structure, such as a Memorandum of Understanding, fosters a sense of shared ownership, provides a sense of purpose, and enhances credibility with external stakeholders.

Equally important is **adopting an output-oriented approach**. The Dutch "full circle" model provides a best-in-class example of how to avoid the "talking group" trap: by committing to at least one tangible, co-funded pilot project each year, the Hospitality Pact ensures that its activities remain demand-driven and that members always have a concrete reason to stay engaged. Whether the annual output takes the form of a research report, a training programme, a policy

recommendation, or a flagship event, the commitment to regular, visible delivery is what distinguishes a functioning partnership from a discussion forum.

On the funding side, coordinators should **diversify their financial base** by proactively exploring all available pathways, from co-investment by industry partners and national or regional government seed funding, to EU grants and modest membership contributions. Closely linked to this is the immediate opportunity to **register with the Pact for Skills** as an official Regional Skills Partnership, which is the single most important action any NRSP can take. Registration unlocks EU-level funding, visibility, and peer networks, and provides a powerful European mandate that can be leveraged in national policy dialogues.

Coordinators should also **close the implementation gap** by investing in translating research and intelligence into practical, accessible, and immediately applicable solutions for small businesses. Curating and promoting "turn-key solutions", meaning guidance that SMEs can act on without significant investment of time or resources, is the most direct way to demonstrate the NRSP's real-world impact. Finally, coordinators are encouraged to **build and sustain connections with other NRSPs** across Europe. The PANTOUR project has created a unique European network of skills partnerships, and regular peer learning events, joint projects, and the sharing of best practices will be essential for the long-term health of the network. The network is stronger together than any individual partnership can be alone.

For national and regional Governments:

The most impactful action that national and regional governments can take is to **grant NRSPs formal institutional recognition** as the official advisory body on tourism skills at the national or regional level. As the Greek coordinator has argued, NRSPs should function as the "think tank" for tourism skills policy, and a formal mandate provides the legitimacy and authority needed to influence policy, attract high-level participants, and secure resources. Closely linked to this is the

need to **provide modest but stable seed funding** to cover the basic coordination costs of the partnership. The lack of dedicated resources is the primary threat to the long-term viability of most NRSPs, and even a relatively small investment in core coordination capacity can unlock significant value. The return on this investment, in terms of better-aligned training systems and a more skilled tourism workforce, far outweighs the cost.

Institutional recognition and funding are, however, only meaningful if governments also **create clear pathways for integrating NRSP recommendations** into national skills strategies and qualification frameworks. An advisory body's value is ultimately measured by whether its advice is acted upon, and governments must ensure that formal mechanisms exist for NRSP proposals to feed into policy and regulatory processes. Finally, and perhaps most fundamentally, the consistent message from across the network is that the absence of public authorities from NRSP membership is the most commonly cited structural weakness. Ministries of Tourism, Education, and Labour must be **active partners at the table**, not passive observers. Their presence is not merely symbolic; it is the precondition for translating the partnership's work into the systemic change that the tourism sector needs.

For the European Commission and the Pact for Skills:

The European Commission should formally **position the NRSP model as the primary mechanism** for delivering the objectives of the Pact for Skills at the national and regional level, providing clear guidance to Member States on the role they are expected to play in supporting these partnerships. Without stronger demand from the Commission, the PfST-NRSP model risks remaining, in the words of the network's own coordinators, "partial and limited." To address this, the Commission should actively **encourage Member State engagement** with their national and regional skills partnerships, whether through country-specific recommendations, dedicated reporting requirements, or conditionality mechanisms linked to relevant funding streams. Such measures would

significantly strengthen the structural foundations of the NRSP network across Europe.

At the same time, the Commission should **mandate and resource formal coordination mechanisms** between related EU-funded projects, such as PANTOUR, TourX, and others operating in the tourism skills space. The European skills agenda is currently supported by a wide range of initiatives that risk operating in parallel rather than in concert. Creating a more cohesive and collaborative ecosystem would avoid duplication, maximise the reach of individual project outputs, and ensure that the knowledge generated by one project is systematically built upon by the next. Finally, the Commission is encouraged to **recognise and protect the diversity of NRSP models**. The evidence in this report demonstrates clearly that there is no single correct approach to skills governance: the flexibility to adapt the model to different national and regional contexts is a strength of the network, not a weakness. Imposing rigid structural requirements that do not account for this diversity would risk undermining the very adaptability that has allowed the network to take root across such varied institutional landscapes.

8. References

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9. Appendices

9.1. Appendix A: Glossary of key terms

Term	Definition
NRSP	National/Regional Skills Partnership. A multi-stakeholder governance structure for skills development in the tourism sector, established under the PANTOUR project.
LSP	Large-Scale Partnership. The overarching European governance structure for the Pact for Skills in Tourism, of which the NRSPs are the national/regional implementation bodies.
Pact for Skills	A flagship initiative of the European Commission under the European Skills Agenda, bringing together public and private stakeholders to commit to upskilling and reskilling.
SSIM	Strategic Skills Intelligence Model. A methodology developed within the PANTOUR project for systematic skills needs analysis.
MoU	Memorandum of Understanding. A formal agreement between partner organisations setting out the terms of their collaboration.
CNFT	Comissão Nacional de Formação Turística. Portugal's National Skills and Training Council for Tourism.
FECT	Foro Español por las Competencias Turísticas. Spain's Tourism Skills Forum.
COG	Careers Oversight Group. Ireland's pre-existing tourism skills structure, currently inactive.
NSG	National Skills Group. The term used for NRSPs in Italy, Bulgaria, and Germany.
VET	Vocational Education and Training.
SME	Small and Medium-sized Enterprise.
CELTH	Centre of Expertise Leisure, Tourism and Hospitality (Netherlands).
LOTM	Landelijk Overleg Toerisme Management. The Netherlands' educational providers partnership.
VIMOSZ	Vendéglátók és Idegenforgalmi Munkáltatók Országos Szövetsége. The Hungarian Hospitality Employers' Association.
SAMK	Satakunta University of Applied Sciences (Finland).
BUas	Breda University of Applied Sciences (Netherlands).
ZRI	Zangador Research Institute (Bulgaria).
IPA	Institute of Public Administration (Ireland).
PfST	Pact for Skills in Tourism.
PacTS4ALL	Pact for Skills for All. A related EU-funded project.

9.2. Appendix B: Summary of Monitoring Form indicator achievement by NRSP

The following tables provide a consolidated summary of the key indicator achievement data from the monitoring forms submitted by all NRSP partners. The data is organised around the four monitoring scopes.

Table B.1 — Scope 1: Governance and operational performance.

Indicator	Portugal	Spain	Netherlands	Hungary	Greece	Finland	Italy	Bulgaria	Ireland
No. of member organisations	50+	115	13+	21	~20	~15	21	20	20
No. of meetings held (project period)	7	8	3+	6	4+	4+	9	12	28 (since 2016)
Average participation rate	>60%	~60%	~70%	~60%	~50%	~50%	<50%	~30%	N/A (inactive)
Formal activity plan in place	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Stand-by
Internal working groups	Yes	No	Yes	No	No	No	Yes (4)	No	No
MoU signed	Yes	Yes	Yes (Pact)	Yes	Yes	Yes	Yes	Yes	Yes

Table B.2 — Scope 2: Core tasks

Indicator	Portugal	Spain	Netherlands	Hungary	Greece	Finland	Italy	Bulgaria	Ireland
Skills intelligence activities conducted	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Learning programmes reviewed	Yes	Yes	Yes	Yes	Partial	Partial	Yes	Yes	No
PANTOUR outputs tested	Yes	Yes (all)	Yes	Yes	Partial	Partial	Partial	Yes	No

Training programmes delivered	Yes	Yes	Yes	Yes	No	No	No	Yes	No
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Table B.3 — Scope 3: Communication

Indicator	Portugal	Spain	Netherlands	Hungary	Greece	Finland	Italy	Bulgaria	Ireland
Digital communication tools used	Yes (2+)	Yes (Thinktur)	Yes	Yes (website + newsletter)	Yes	Yes	No	Yes (Facebook)	No
External events organised/attended	Yes	Yes	Yes (6+)	Yes (6)	Yes	Yes	Yes	Yes	No
Brand identity developed	Partial	Yes (FECT)	Yes (Pact)	Yes	Partial	Partial	Partial	No	No

Table B.4 — Scope 4: Financial sustainability

Indicator	Portugal	Spain	Netherlands	Hungary	Greece	Finland	Italy	Bulgaria	Ireland
Dedicated budget available	Yes (public)	No	Partial (co-fund)	Partial	No	No	No	No	No
MoU or formal commitment in place	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Confidence in long-term sustainability	High	Medium	High	Medium	Low	Low	Low-Medium	Low	N/A

9.3. Appendix C: NRSP Monitoring Forms

For the list of the NRSP Monitoring Forms, please refer to the zip folder.

9.4. Appendix D: NRSP Feedback Questionnaires

For the NRSP feedback questionnaires, please refer to the zip folder.

9.5. Appendix E: NRSP Country Report 2024

For the NRSP Country Report for 2024, please refer to the zip folder.



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