



UN Tourism

26th General Assembly

RIYADH, SAUDI ARABIA 7 – 11 NOVEMBER 2025

MIPC/SC/2025

Madrid, 26 November 2025

Committee on Tourism and Competitiveness (CTC) 17th MEETING (by invitation only) Friday 7 November 2025 from 12:30 to 14:00 hrs. Venue: Mandarin Oriental Hotel - Room Omsiat

MINUTES

The 17th Meeting of the Committee on Tourism & Competitiveness (CTC) was held in person on Friday 7 November 2025 in Riyadh, Saudi Arabia, during the 26th session of the General Assembly.

This was the fourth meeting of the CTC – the third in person - in its current composition (2023-2027).

The relevant documents are attached for information: **i)** Agenda (**Annex I**); **ii)** List of Participants (**Annex II**); **iii)** Presentation on the progress of the 'World Tourism Report' (**Annex III**); **iv)** Presentation on the work plan of the CTC 2026-2027 (**Annex IV**); **v)** Updated List of Members of the CTC (2023-2027) (**Annex V**); **vi)** Official group photo (**Annex VI**).

Item 1. Welcome remarks by Ms. Zoritsa Urosevic, Executive Director, UN Tourism

1. The meeting was opened by **Ms. Sandra Carvao**, Director of Market Intelligence, Policies and Competitiveness at UN Tourism, who welcomed participants and noted that the **Executive Director, Ms. Zoritsa Urosevic**, would join following the opening of the Committee on Statistics. **Ms. Carvao** expressed appreciation to the **Chair** of the Committee (**Kenya**) and **Vice Chair (Sri Lanka)** for their leadership.
2. The **Chair** subsequently confirmed quorum and invited members of the Committee to introduce themselves.
3. Participating members of the CTC included: **Kenya, Lebanon, Malta, Republic of Moldova, Sri Lanka, Uruguay**, and **Flanders** (Associate Member). Additionally, other Member States and Affiliate Members attended as Observers.

Item 2. Welcome remarks by the Chair (Kenya)

4. The **Chair** thanked Members for their confidence in **Kenya's** leadership and commended the Kingdom of Saudi Arabia for exceptional hospitality. He highlighted tourism's economic importance to Kenya and underscored the country's strategic focus on:

- Digital transformation
- Sustainability
- Resilience

5. The **Chair** reiterated **Kenya's** commitment to sustainability through the Green Tourism Strategy and Carbon-Neutral Destination Vision 2030 initiative as well as to digital transformation from the country's e-visa policy to smart tourism hubs that facilitate data-driven decisions. The **Chair** also emphasised collaborative engagement in the World Tourism Report and conveyed greetings from the Minister of Tourism of Kenya.

Item 3. Adoption of the agenda

6. The agenda was adopted unanimously.

Item 4. Presentation on the progress of the Flagship Initiative “World Tourism Report” by Sandra Carvao, Director, Market Intelligence, Policies and Competitiveness, UN Tourism

7. **Ms. Carvao** provided a comprehensive update on the flagship initiative approved at the previous General Assembly¹. The report comprises three main components:

I. Policy Benchmarking (Four pillars: People, Planet, Prosperity, Governance):

- An initial set of 142 policy indicators under the four pillars were developed by the Market Intelligence, Policies and Competitiveness Department, and reviewed by relevant UN Tourism Department + all UN Tourism committees – including the CTC - and the Expert Advisory Panel.
- This set of indicators stands as the basis of the self-assessment survey circulated to Member States; 45 responses received. The online self-assessment tool is expected to be available in the future for Member States to evaluate themselves in terms of tourism policy.
- To complement the policy analysis, the Secretariat is to review over 90 national tourism strategies (80 are completed).
- The final policy benchmark will be based on a total of 25 indicators sourced from external official sources (such as UN and other international sources, etc.) and 17 indicators from the analyse of the national policy documents.

II. Performance Indicators (Three pillars: Prosperity, People and Planet)

- The same process was followed for the development of proposed indicators of performance including internal revision, revision by the UN Tourism Committees and Expert Panel.
- Coverage assessment underway.
- Based solely on existing Member State reporting or available public data to avoid additional data burden.
- Final version of performance indicators will be shared with the CTC shortly for revision

III. Tourism Trends & Foresight Chapter

- Five regional foresight interactive online sessions were held in June 2025 with UN Tourism Member States and non-Member States with 180+ participants from 100 countries.

¹ 25th session held on 16-20 October 2023 in Samarkand, Uzbekistan ([A/RES/757\(XXV\)](#))

- Climate change and digitalisation identified as the high-impact, high-uncertainty drivers.
- Four scenarios developed in collaboration with the European Tourism Futures Institute.

IV. Thematic Chapter

- Theme to be finalised; so far inputs point to the theme of tourism governance

8. **Ms. Carvao** shared that the publication was expected to be published in May–June 2026.

9. **Ms. Carvao** explained that in the 26th General Assembly a dedicated briefing paper on 50 Years of Tourism Global Trends and Future Scenarios would be presented by the Secretariat and Member States would receive a printed copy allowing them to have the opportunity to see how tourism has evolved in the past five decades and what were the forecasts and possible scenarios for the future of the sector.

- Key Long-Term Trends identified:
 - 7-fold growth in international arrivals over the past 50 years.
 - 11-fold real-term increase in tourism export revenues in the same period.
 - Upward revision of the forecast for 2030, now expected to reach 2.0 billion arrivals.

10. **Ms. Carvao** thanked the participants for their attention and gave the floor back to the Chair.

11. The **Chair** thanked **Ms. Carvao** for her presentation and insights, reiterated the relevance of the report and expressed they very much looked forward to its publication in 2026.

12. The **Chair** opened the floor for CTC Members' discussion.

13. **Sri Lanka** (Vice-chair) emphasised sustainability, heritage conservation, quality tourism, and climate resilience and highlighted that competitiveness cannot rely only on price and that sustainability is a key factor for competitiveness and that the country has invaluable natural and cultural resources that need to be protected and valued. The **Vice-chair** also explained that they have important challenges, in particular as regards to training in sustainability and advancing public-private partnerships. **Sri Lanka** looks forward to the World Tourism Report to learn from other successful practices and case studies and commits to collaborate with other countries to enhance solid and sustainable tourism policies.

14. **Malta** mentioned that the World Tourism Report is very ambitious as it analyses tourism policy in four pillars, which is an unprecedented and important exercise. Malta recalled the importance of focusing on unmanaged growth and carrying capacity limits. Malta suggested as a follow-up to the first edition of the WTR a deeper look into numbers and tourism growth.

15. **Republic of Moldova** supported the development of the WTR and noted that priorities and challenges may vary from one country to another and sometimes also within the same country, while noting also regional instability impacts that may affect in a different manner to countries even within the same region. The Republic of Moldova also shared their recent experience and good practices in national progress in human resources and SME support as well as in governance, with the creation of an interministerial committee on tourism.

16. **Flanders** also recognized that growth as a priority would depend on the level of development of tourism as destination and while for other countries it was a priority it was not for them and questioned the assumption that growth should be a goal; highlighted non-growth models.

17. **Zambia** joined the debate on growth and explained that in their case they advocated high-value, low-volume tourism aligned with conservation and community benefits. For **Zambia**, natural resources and sustainability as well as inclusiveness and spreading the benefits of tourism among

all stakeholders and communities were at the centre of their tourism policy. As regards to growth, Zambia mentioned it is crucial to manage it properly.

18. **Ms. Carvao** thanked the Members for their insights and reaffirmed that forecasts support planning rather than act as growth targets or aims set by UN Tourism but rather an assessment of how tourism demand is expected to develop which is essential information for planning the sector and its sustainable management.
19. **Ms. Zoritsa Urosevic**, Executive Director, UN Tourism joined the meeting and the Chair gave the floor to her.
20. **Ms. Urosevic** apologized for not having been able to open the meeting as she also had to open another meeting. **Ms. Urosevic** underscored the importance of knowledge generation and governance innovation. The **Executive Director** highlighted the value of the first edition of the World Tourism Report and the online self-assessment on tourism policy as a practical tool Members could use for their own needs and commended the Committee for the progress with the Report.
21. The **Chair** thanked the **Executive Director** for her inspiring remarks and gave the floor to **Ms. Carvao** to move forward with the next item in the agenda.

Item 5. Discussion on the work plan of the CTC 2026-2027

22. **Ms. Carvao** presented a proposal of work plan for the CTC for the period of 2026-2027 based on the draft Programme of Work 2026–2027 to be presented for approval to the 26th General Assembly. Key components include:
 - I. Market Intelligence & Knowledge Tools
 - Monthly updates of arrivals and receipts dashboard as well as expanded KPIs.
 - Expand existing UN Tourism / European Travel Commission (ETC) Data LaB to other regions
 - Continued support as G20 knowledge partner and maintenance of the Tourism & SDG Dashboard on tourism policies.
 - Proposal for a Global Tourism Policy Dashboard.
 - II. Tourism Policy Priorities
 - Short-term rentals.
 - Research paper on managing tourism growth.
 - Re-establishment of the Mayors' Forum on Sustainable Urban Tourism, including potential recognition mechanisms for local leadership.
 - III. Product Development
 - Gastronomy Tourism: global and regional forums, best practices report.
 - Mountain Tourism: World Congress in Andorra (March 2026); impact of climate change research.
 - Urban and wellness tourism initiatives.
 - IV. Tourism for Rural Development
 - Expansion and consolidation of the Best Tourism Villages by UN Tourism Network (nearly 300 villages). Next edition (6th) to be launched early in 2026
 - Second Global Conference on Tourism and Rural Development.

- Broader application of rural self-assessment tool (START) and national pilots (e.g., Peru).
- Piloting of the Tourism Small Grants Programme in Africa.
- Development of an integrated policy framework for rural tourism.
- Research on Tourism and Rural Development in the Middle East
- Executive training at the UN Tourism Regional Office in Saudi Arabia on Agritourism.

V. Flagship Initiatives

- Tourism Forecasting 2050.
- Proposed biennial Global Trends Event.
- Preparation of the second *World Tourism Report* (2028).
- Destination +

23. After her presentation on the proposed work plan for the CTC 2026-2027 **Ms. Carvao** added that in the next CTC meeting planned to be held in January 2026 in Madrid, Spain, during FITUR, the CTC will go into detail on this proposed work plan but any feedback at this point, also on which initiatives are of more priority to the committee, would be welcomed.
24. The **Chair** congratulated Ms. Carvao and UN Tourism for her comprehensive presentation of the proposed work plan for the CTC 2026-2027 and opened the floor for discussion.
25. **Republic of Moldova** commended the work plan, aligned national priorities, and requested support for DMOs under new Moldovan legal frameworks.
26. No additional interventions were made.
27. The **Chair** concluded that Members expressed overall satisfaction with the work plan and encouraged delegates to continue sharing comments with the Secretariat ahead of the next meeting of the CTC planned to be held hopefully in January in Madrid.

Item 6. Other issues

28. No additional issues were raised by Member States.

Item 7. Closing Remarks by Ms. Zoritsa Urosevic, Executive Director, UN Tourism

29. **Ms. Zoritsa Urosevic** encouraged more active participation from Members, noting that in-person engagement is essential for effective UN Tourism support. The **Executive Director** highlighted the strong impact and popularity of the Tourism for Rural Development Programme and reaffirmed its relevance for both developed and developing countries. She acknowledged the successful operation of the Best Tourism Villages initiative and training activities hosted by the Regional Office in Saudi Arabia.

Item 8. Closing Remarks by the Chair (Kenya)

30. The **Chair** thanked the **Executive Director**, Secretariat, and participating CTC Members for their contributions and engagement. The **Chair** welcomed progress on the World Tourism Report, including the new 50-year trends briefing paper and updated 2030 forecast. The **Chair** emphasised the need for sustainable, inclusive tourism growth and encouraged Member participation in advancing the 2026–2027 work plan.
31. The **Chair** wished delegates a successful General Assembly week and concluded the meeting.