

ECIAA

Annual Report

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# Word from the **PRESIDENT**

**Mr Frank Oostdam | ECTAA President**

**Dear colleagues,**

The year 2025 was marked by intense legislative activity at European level and by decisive moments for the future of travel agents and tour operators. At the heart of our work stood the revision of the Package Travel Directive. After years of engagement and sustained advocacy, the provisional political agreement reached in December represents an important step towards a more balanced and workable framework, preserving strong consumer protection while better reflecting the operational realities of our sector.

Beyond the Package Travel Directive, ECTAA remained fully mobilised on a broad range of policy files that directly affect our members. Passenger rights, airline failure protection, multimodal travel, digital booking and ticketing initiatives, VAT reform, data protection, and sustainability all featured prominently on our agenda. In each of these areas, our objective has been to promote fair competition, less administrative burdens and coherent rules for travel intermediaries.

2025 was also a year of strong engagement and cooperation. Our semi-annual meetings in Macao and Rabat, the Travel Protection Summit in Brussels, and numerous events and webinars offered valuable opportunities for dialogue and exchange. I am particularly proud of our solidarity initiative for Ukrainian children, which once again showed the sense of responsibility and unity within our travel community.

As we look ahead to 2026, with key legislative proposals on the horizon and new rules moving towards implementation, ECTAA will remain focused on supporting its Members and shaping a fair and resilient framework for European travel distribution, guided by our upcoming Strategy 2030.

I invite you to explore this Annual Report and review ECTAA's work throughout 2025. I warmly thank our Members, partners, and the Secretariat for their continued commitment and support.

**Looking forward to another dynamic year ahead.**  
Frank Oostdam, President of ECTAA, December 2025.



# WORK AND ACHIEVEMENTS



# CONSUMER PROTECTION: Revision of Package Travel Directive

The year 2025 marked the culmination of a long and complex legislative process with the provisional political agreement on the revision of the Package Travel Directive (PTD) (Directive (EU) 2015/2302), reached by the co-legislators on 2 December 2025. Throughout the negotiations, ECTAA remained actively engaged, consistently advocating for a clearer, more practical Directive. These sustained efforts resulted in several meaningful improvements reflected in the final draft agreement.

In the first half of 2025, ECTAA concentrated its efforts on shaping the European Parliament's position on the PTD revision, engaging closely with Rapporteurs, Shadows and key IMCO members and staff ahead of the committee and plenary votes. This early stage advocacy secured several decisive wins, including the removal of most problematic elements of the proposed prepayment limitations, the suppression of Linked Travel Arrangements (LTAs) as a distinct regulatory category, and the deletion of the "3-hour package" definition—thereby heading off some of the most distortionary and legally uncertain aspects of the initial draft. At the same time, a number of concerns persisted in the Parliament's report, notably around the new 24-hour rules replacing LTAs and the risk of further fragmentation through potential national prepayment limitation regimes, which ECTAA carried into the subsequent trilogue discussions as key priorities for improvement.

A central focus of ECTAA's advocacy was the simplification of the Directive's scope and definitions, which had become increasingly complex and difficult to apply. From the outset, ECTAA argued that the concept of Linked Travel Arrangements (LTAs) created confusion rather than legal certainty. This position was fully vindicated in the final agreement, which confirmed the complete removal of the LTA category achieving one of ECTAA's longstanding goals.

ECTAA also successfully opposed the proposed "3-hour package" rule, which was incompatible with existing pre-contractual information obligations and has now been removed. While ECTAA had called for full exclusion of the "24-hour package" rule, a pragmatic compromise was reached allowing traders to avoid package liability by clearly informing travellers that the combination of services does not constitute a package. Although not a full exemption, this solution gives traders better control over PTD obligations and represents a balanced outcome.

Beyond legal clarity, ECTAA prioritized the reduction of financial burdens and the protection of organizers' liquidity. A key achievement was the deletion of Article 5a, which would have introduced harmonised limits on prepayments. ECTAA had consistently warned that this measure would disrupt cash flow and distort competition. Its removal fully aligns with ECTAA's position and represents a major victory for organizers across the internal market. Although references to possible national measures remain in the recitals, avoiding an EU-wide restriction was a decisive outcome.

To further support organizers' liquidity, ECTAA secured the inclusion of a new business-to-business refund obligation requiring service providers to refund organizers within seven days when a service included in a package is cancelled or not performed. This measure directly enables organizers to meet their 14-day refund obligation towards travellers.

ECTAA also played a key role in preventing the most far-reaching extensions of organizer liability, especially in relation to external geopolitical and safety risks. In particular, the final agreement removed the place-of-residence element and the European Parliament's proposed "28-day travel warning" rule, while references to official travel warnings were confined to a recital, thereby avoiding the most problematic legal consequences.

On enforcement and dispute resolution, ECTAA ensured the deletion of prescriptive provisions on penalties and ADR, and substantially improved the proposed complaint-handling framework. Although not all new requirements could be removed, the remaining rules were made workable in practice and better aligned with existing procedures.

Taken together, the outcomes of the PTD revision reflect ECTAA's sustained and strate-

gic advocacy throughout 2025, resulting in a more balanced, coherent, and economically viable framework for Europe's travel sector.

Looking ahead, ECTAA will continue to play an active role in the implementation phase of the revised Directive and in promoting consistency between package travel rules and ongoing passenger rights reforms, ensuring fair and coordinated protection for both travellers and intermediaries.

**"As the PTD debate intensified, we had to remain firm on our red lines and united in our messaging; through close coordination with our Members and with other European travel associations, we ensured that the sector spoke with one voice on the most critical issues at every level!"**

**Frank Oostdam President of ECTAA, December 2025**





# TRANSPORT: Passenger Rights

Throughout 2025, ECTAA has been actively involved in negotiations on the EU passenger rights framework. The association has focused on ensuring robust consumer protection while safeguarding the viability of travel intermediaries and securing coherence with the Package Travel Directive (PTD).

## Enforcement of passenger rights and new multimodal passenger rights

The co-legislators have made significant progress toward reaching a compromise on two legislative proposals: strengthening the enforcement of passenger rights and introducing new rights for passengers on multimodal journeys. While ECTAA generally supports these initiatives, it has raised several key concerns on behalf of intermediaries in both proposals:

- **Intermediary fees:** Strong opposition to any obligation requiring intermediaries to refund their service fees in cases of cancelled transport services. The Council has shown greater understanding of this concern, proposing instead enhanced transparency regarding the refundability of intermediary fees and requiring refunds only for those elements explicitly identified as refundable.
- **Refunds through intermediaries:** Need for improved refund procedures and deadlines that reflect global industry practices and standards. To date, neither the Council nor the Parliament has adequately addressed this issue.
- **Alignment between passenger and package travel rights:** Call for better consistency between the passenger rights framework and the Package Travel Directive, particularly concerning refunds and complaint handling. This concern appears to be well understood.

- **Use of passenger contact details:** Support for a strict ban on the use of passenger contact details by airlines for commercial or marketing purposes, as endorsed by the European Parliament.

Regarding multimodal travel, ECTAA has also strongly opposed the European Parliament's proposal to extend full passenger rights protection to journeys composed of two or more separate tickets. Such an extension would considerably increase intermediary liability and could discourage them from offering multimodal travel options—ultimately reducing consumer choice.

**Next steps:** Discussions on these proposals are ongoing, although further progress may be delayed until there is movement on the revision of the Air Passenger Rights Regulation (see below). ECTAA will continue advocating for the positions outlined above, with particular emphasis on ensuring that travel intermediaries are not required to refund their service fees.

## Revision of air passenger rights

At the end of 2024, the Council reopened discussions on the long-pending 2013 proposal to revise the EU Air Passenger Rights Regulation, the aim of which is to strengthen passenger rights, enhancing legal clarity, and achieving a fairer balance between passenger protection and airline costs.

For ECTAA, the main priorities remain the following:

- **Passenger protection against airline insolvency:** Following ECTAA's advocacy, the European Parliament reintroduced an amendment requiring airlines to establish mechanisms—such as insurance or guarantee funds—to ensure refunds and repatriation in the event of airline failure.

- **Right to compensation after 3 hours:** ECTAA supports the maintenance of the current 3-hour delay compensation threshold, in line with ECJ case law. This remains one of the most contentious issues between Parliament and Council, with Parliament resisting changes to the trigger point that would reduce the number of passengers eligible for compensation.
- **Partial prohibition of no-show policies:** ECTAA has consistently backed extending rights to passengers who are denied boarding on the ground that they have not used the inbound flight of their return ticket. This is broadly supported by the co-

legislators, but it does not go as far as preventing airlines from charging passengers -or the travel intermediary- for not using the outbound flight.

The Council and European Parliament were unable to reach an agreement in second reading, meaning the proposal will proceed to a third reading (Conciliation) in early 2026. The institutions will have six weeks to reach a deal; otherwise, the proposal will lapse. Reaching agreement will be challenging, as the Parliament retains firm red lines, particularly concerning the 3-hour delay compensation rule and the inclusion of a free luggage allowance.



“The European Parliament is ready to fight for Europe’s passengers. [...] We stand firm on keeping the three-hour threshold for compensation and will not step back from this position, which has been backed by the European Court of Justice. “

**European Parliament Rapporteur Andrey Novakov**



# TRANSPORT: Digital Booking and Ticketing Initiatives

The European Commission has launched work on several connected initiatives to make booking and ticketing of transport services easier and to ensure stronger, fairer passenger protection. Three key measures are in preparation:

**Multimodal Digital Mobility Services and Single Digital Booking and Ticketing Regulation:** These two initiatives aim to make it easier for passengers to find, compare and book multimodal tickets using services provided by multimodal digital platforms. The first proposal aims to improve the online multimodal ticketing market by increasing transparency, establishing a level playing field for operators and preventing distortion of competition among platforms. The second proposal will focus on rail, boosting the number of rail tickets and associated fares available on online platforms.

**Extended rail passenger rights:** This initiative plans to revise the Rail Passenger Rights Regulation to extend passenger protection for rail-rail combined journeys, even when sold as separate tickets.

ECTAA supports the objectives of these initiatives, but has raised several key issues that must be addressed for the system to work effectively and fairly:

- **Mandatory data sharing:** All carriers—including rail and air—should be required to share schedules, fares, and ticketing content with intermediaries on FRAND (fair, reasonable and non-discriminatory) terms to enable transparent comparison and multimodal booking.

- **Balanced obligations:** The MDMS Regulation must not impose burdens solely on digital platforms; major transport operators should have reciprocal data-sharing duties to ensure a level playing field between incumbent, often monopolistic, rail operators and distribution platforms.
- **Intermediary liability:** Intermediaries must not be made liable for passenger rights or compensation in cases of travel disruption for rail journeys, as they have no control over service operations and operate on extremely thin margins.
- **Content access and real-time information:** Intermediaries should have equal and timely access to rail and multimodal content to provide accurate travel updates and rerouting assistance to passengers.

ECTAA has submitted detailed feedback to the Commission's impact assessment for both the MDMS and SDBTR proposals as well as to the call for evidence on rail passenger rights, emphasising the need for balanced, evidencebased regulation.

Next steps: The Commission is expected to present legislative proposals in the fourth quarter of 2026.

“36% of Europeans struggle to book tickets that combine different transport modes, such as air-to-rail or train-to-bus connections.”

**Eurobarometer on Multimodal Digital Mobility Services, April 2025**



# TRANSPORT: Transparency and Airline Failure Protection

The Commission is currently reviewing the functioning of the Air Services Regulation (Regulation 1008/2008), which governs key aspects of the EU internal air services market, including licensing, financial monitoring of air carriers, public service obligations and pricing rules, with specific provisions on price transparency and non-discrimination. ECTAA has submitted a detailed contribution to the public consultation, focusing on those elements that directly affect travel intermediaries and their customers.

## Key issues for ECTAA

- **Airline failure and financial monitoring:** ECTAA stresses that the existing financial monitoring obligations, which underpin the granting and maintenance of operating licences, are important but cannot substitute for a dedicated airline failure protection regime that would safeguard passengers and intermediaries when carriers cease operations.
- **Price transparency and non-discrimination:** ECTAA calls for clearer, standardised price displays that distinguish refundable and non-refundable components and ensure equal treatment regardless of the passenger's place of residence or the location of the ticket seller within the EU.

- **Ancillary services and sales channels:** The contribution underlines that all ancillary services (such as baggage, seat selection and other options) must be available in a standard and processable format through all sales channels, not only on airline websites, and that families should, wherever possible, be seated together without having to pay a seat-reservation fee.
- **Carry-on luggage and sustainability:** ECTAA advocates that a standard-sized carry-on luggage be included in every fare as part of fair and transparent pricing. It also supports broad promotion of Sustainable Aviation Fuels (SAF), and opposes blanket flight bans as an instrument of environmental policy.

The next step at EU level will be for the Commission to finalise its impact assessment and table a formal legislative proposal to amend Regulation 1008/2008, taking into account the results of the consultation. Once the proposal is published, ECTAA will intensify its advocacy with the EU co-legislators to secure robust provisions on price transparency, non-discrimination and ancillary services, and to push for an effective solution on airline failure protection that complements, rather than relies solely on, financial monitoring rules.

1,200 commercial passenger airlines have ceased operations in the past 25 years. Travel intermediaries typically pay airlines upfront for tickets. If the airline fails before service delivery, the money is effectively lost—leaving intermediaries with significant unsecured financial exposure and liquidity risk.



## TRANSPORT: IATA: Passenger Agency Programme

ECTAA is one of three recognised travel agency associations represented in the Passenger Agency Programme Global Joint Council (PAPGJC), where agency and airline delegates discuss developments in the IATA Passenger Agency Programme. Proposed changes are submitted to the Passenger Agency Conference (PAConf), where only airline delegates vote on amendments to the IATA Resolutions binding on all IATA-accredited agents. In 2025 the most relevant and critical items concerned:

- **Scope of Travel Agency Commissioners:** ECTAA together with other agent delegates heavily pushed back on the proposal aiming at limiting the Travel Agency Commissioner scope for due diligence cases. The proposal seemed to have been triggered by one specific case in the UK which can be seen on the TAC website [here](#). Despite the massive criticism from agent representatives during the PAPGJC meeting, a slightly amended proposal was included in the last set of mail votes for approval by PAConf airlines. ECTAA engaged with WTAAA, ABTA and ASTA. Following this strong intervention and including the involvement of an agency consortia as well as a large airline, the proposal was withdrawn. Further consultations will follow.
- **Global alignment of remittance periods:** Two years ago IATA presented an initiative for a global alignment of remittance periods with what is foreseen by Resolution 812, 6.5.3 available [here](#). The remittance period is the time following the billing cycle (weekly, fortnight) until the money

needs to be transferred to IATA. From the beginning ECTAA and WTAAA have raised their concern and recalled the essential role of strong and well-informed APJCs in ensuring balanced oversight and appropriate local governance within the PAP including billing cycles and also remittance periods. Resolution 812, like all resolutions, was decided solely by airlines. The remittance periods should continue to be discussed and approved in the local APJCs, as is the case with other aspects of the Local Financial Criteria (LFC). In the meantime, most markets have already agreed on a timeline including possible transition periods to bring in line their remittance periods. In September 2025 IATA presented a proposal with a deadline requiring all markets which have not yet agreed on an alignment to apply the remittance periods per resolution as of 1 July 2026. Despite the strong criticism by agent delegates, the proposal was included in the last set of mail votes and adopted in the end.

Also in 2025, a task force looking into future-proofing the Passenger Agency Programme finished its work. The task force was set up on demand of ECTAA and WTAAA and with their involvement. The task force discussed the different parts of the Passenger Agency Programme – BSP, ONE Order, non-financial requirements, financial requirements, accreditation, agent relation and governance. A report covering the findings was presented to the PAPGJC. This will be followed up in future PAPGJC meetings.



## TAXATION: VAT Rules for Platforms

The 'VAT in the Digital Age' (ViDA) package introduces new VAT obligations for digital platforms that facilitate the sale of "untaxed" short-term accommodation (e.g., properties offered by private owners) and passenger transport services. The objective is to create a level playing field between the platform economy and traditional providers. The key challenge now lies in how these rules will be applied in practice, as the European Commission is preparing Explanatory Notes to guide consistent implementation across Member States.

For ECTAA, it is crucial that the forthcoming guidance provides clarity on several important points:

- **Interaction between platform rules and TOMS:** The most pressing issue concerns the relationship between the existing special VAT scheme for travel agents (TOMS) and the new platform rules (DSR, Article 28a). ECTAA strongly advocates for the interpretation that TOMS and platform rules are separate, and that genuine travel agents operating under TOMS must remain outside the scope of the DSR. The alternative interpretation, where DSR overrides TOMS, would create significant administrative complexity, requiring tour operators to exclude untaxed accommodation from their TOMS calculation and instead apply the DSR rules.

- **Addressing Chain Transactions:** Long supply chains (e.g., hotel – bed bank – OTA – customer) are common in the travel sector. This raises uncertainty about who in the chain becomes liable under the new platform rules—whether the first or last supplier—each scenario bringing compliance challenges. ECTAA has submitted examples to illustrate these complexities and to show how, in some cases, the DSR could inadvertently apply even when the underlying accommodation has already been taxed.

Following an initial exchange during the FISCALIS workshop in mid-September, in which ECTAA actively participated, the Commission has begun drafting the Explanatory Notes. This work will continue throughout 2026, with publication expected in the first quarter of 2027. ECTAA will remain fully engaged in this process to ensure that travel agents selling in their own name can continue to apply TOMS, while travel intermediaries, who may be caught by the platform definition, have clarity on the new rules.



# TAXATION:

## VAT Package for Travel and Tourism

After years of postponement, the European Commission revived plans to revise the special VAT scheme for travel agents. A public consultation on the review of VAT rules for travel agents and passenger transport services was launched in July 2025. ECTAA has responded to the call for evidence and the consultation highlighting -once again- the position of the industry:

The Special Scheme for Travel Agents (TOMS) is a good simplification measure and should be maintained. However targeted reforms are needed to deal with the current distortions:

- **Levelling the playing field between EU and non-EU operators:** Maintain place of supply rules for EU travel agents but bring non-EU travel agents into EU VAT scope, by changing their place of supply to the traveller's place of residence.
- **VAT neutrality:** Allow an opt-out from TOMS for agents selling to business clients, enabling application of standard VAT rules and input VAT recovery.

- **Simpler margin calculation:** Allow global margin calculation and the possibility to offset negative margins from positive ones.
- **Broad scope:** Keep the scheme broad -by including all travel services, including single supplies- to allow travel agents to benefit from the simplification of the rules, but exclude zero-rated international transport which does not require any simplification.

ECTAA has coordinated its response with Members and with other travel organisations. Results of the call for evidence shows that ECTAA's views are shared by many stakeholders, giving broad support for the revision to go forward.

ECTAA will continue engaging with the European Commission on the revision of the special scheme. A stakeholder workshop will be organised in 2026 and a travel and tourism package, including possible reform of the passenger transport VAT rules, is planned for the fourth quarter of 2026.

Most respondent agreed/strongly agreed that the current TOMS rules undermine VAT neutrality for both travel agents and their business customers. 71-80% of respondents support an optional application of TOMS to B2B supplies.

**Summary report of the Call for Evidence, November 2025**

## GDPR: Spanish Royal Decree

In 2025, ECTAA intensified its advocacy at EU level against the “excessive” data collection requirements introduced by Spain’s Royal Decree 933/2021, building on the legal analysis and awareness-raising carried out in 2023 and 2024. Although the Decree entered into force on 2 December 2024, ECTAA continued to contest its content, pointing to disproportionate data collection obligations, unnecessary duplication of information, GDPR compliance risks, and potential distortions of competition between direct and indirect bookings in the travel sector.

Together with ACAVe, ECTAA translated its legal concerns into a targeted advocacy campaign with European institutions. Between February and March 2025, several meetings were held with Members of the European Parliament and representatives of the European Commission to highlight the risks posed by the Decree, particularly regarding passenger data protection, cybersecurity vulnerabilities in data transmission, and the impact on the competitiveness of travel agencies and Spain’s attractiveness as a tourist destination.

As an immediate follow-up, ECTAA and ACAVe sent a formal letter to the European Commissioner for Justice, Michael McGrath, detailing serious violations of EU data protection rules, including the obligation for agencies to collect sensitive information such as customers’ means of payment. These concerns had already been raised with the Spanish Data Protection Agency in 2024, without any response, underlining the ongoing nature of the issue.

The advocacy efforts produced tangible results, with the European Commission confirming that it was examining the Royal Decree in light of EU data protection legislation and engaging in discussions with the Spanish authorities. In July 2025, the Commission acknowledged that the Decree remains incomplete pending the adoption of a Ministerial Order, still in draft form, and indicated that further steps would be decided once this implementing measure is published. ECTAA reiterated its demand that travel agencies be excluded from the scope of the Decree, stressing that existing EU and national legislation only provides for data collection by accommodation providers, not travel agencies.



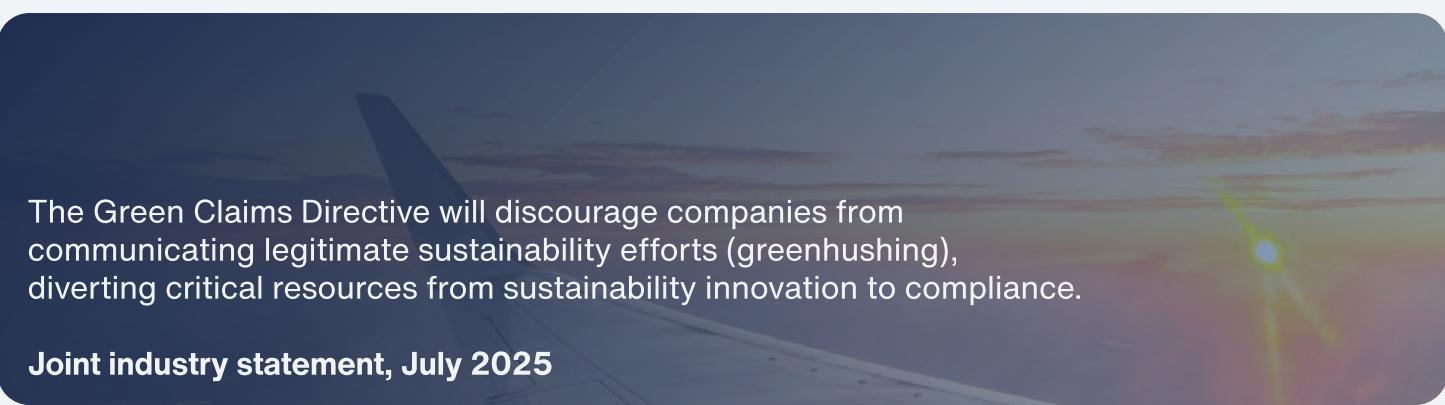
# SUSTAINABILITY: Green Claims

The European Commission's *Green Claims Directive* proposal aims to ensure that environmental claims made by companies are reliable, verifiable, and based on recognised scientific evidence, in order to protect consumers and promote fair competition in the Single Market.

ECTAA supported the objectives of the proposal but raised several concerns regarding its practical implementation. In particular, the requirement for ex-ante verification of green claims was considered costly, time-consuming, and likely to create administrative bottlenecks, especially for SMEs that make up the vast majority of the travel and tourism sector. ECTAA also questioned the scope of responsibility placed on intermediaries, such as travel agents and tour operators, who merely sell services on behalf of other traders and have limited control over the underlying environmental claims.

Together with other European industry organisations, ECTAA co-signed a joint statement urging EU co-legislators to reconsider the proposal, highlighting the disproportionate burden it would impose on micro and small enterprises and the need for clearer, more harmonised rules.

The GCD proposal has been suspended. Nonetheless, the prohibition of greenwashing remains in place through the recently adopted *Directive on Empowering Consumers for the Green Transition*, which integrates misleading environmental claims into the *Unfair Commercial Practices Directive*. Traders are already prohibited from making false or unsubstantiated environmental claims in their marketing communications.



The Green Claims Directive will discourage companies from communicating legitimate sustainability efforts (greenwashing), diverting critical resources from sustainability innovation to compliance.

**Joint industry statement, July 2025**

A photograph of two business people in suits shaking hands over a city skyline at night. A digital interface overlay is visible, featuring a circular progress bar at the top and a large, semi-transparent circular element in the center. The text 'COLLABORATION WITH PARTNERS' is overlaid at the bottom in large, white, sans-serif capital letters.

# COLLABORATION WITH PARTNERS



## DESTINATIONS

# Spotlight on ECTAA's destination partners

ECTAA strengthened its global presence through strategic partnerships with two vibrant destinations in 2025, Macao and Morocco, both hosts of ECTAA's semi-annual meetings. These collaborations offered ECTAA Members first-hand insight into the rich tourism offerings of both regions and how travel agents can better promote them to European travellers.

### Macao SAR - Expanding European Commercial Corridors in Asia

In the spring of 2025, ECTAA convened its semi-annual meeting in Macao, hosted by the [Macao Government Tourism Office \(MGTO\)](#). This summit served as a critical implementation phase of the partnership, facilitating direct engagement between European travel leaders and Asian tourism stakeholders to modernize cooperation models.



A primary objective of the partnership is to showcase Macao's successful transition toward a diversified tourism economy. Beyond its traditional reputation, Macao is asserting its position as a UNESCO Creative City of Gastronomy and a hub for high-end MICE (Meetings, Incentives, Conferences, and Exhibitions) infrastructure. By October 2025, the region demonstrated a robust recovery, with total visitor arrivals reaching 33.1 million, a 14.1% year-on-year increase, signalling a near-total return to pre-pandemic performance levels.



The strategic value of Macao as a "bridgehead" for the Asian market has been significantly enhanced by recent regulatory shifts in Mainland China. Throughout 2025, the expansion of the 30-day visa-free entry policy for citizens of numerous European nations: including France, Germany, Italy, Spain, and Portugal, has transformed the regional travel landscape.



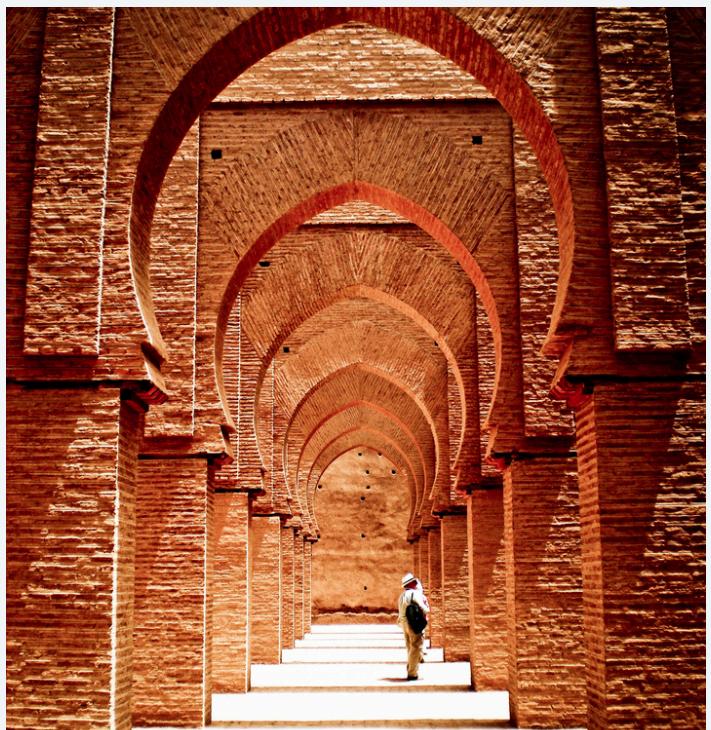
This policy evolution provides a unique commercial opening for European travel professionals. Macao now serves as a seamless entry point for "multi-destination" itineraries within the Greater Bay Area (GBA), allowing operators to combine Macao's luxury and heritage offerings with the vast economic and cultural attractions of neighbouring mainland provinces. ECTAA remains committed to leveraging this partnership to secure new business opportunities for our members, capitalizing on eased border formalities and the region's renewed appetite for international exchange.

## Morocco – A Gateway Between Europe and Africa

In November 2025, ECTAA held its autumn semi-annual meeting in Rabat, hosted by the [Moroccan National Tourist Office \(ONMT\)](#). This event followed the signing of a strategic two-year partnership in March 2025, aimed at positioning Morocco as a destination of excellence for European travellers.



The timing of this collaboration is pivotal: Morocco is currently experiencing a historic tourism boom, surpassing 18 million arrivals by November 2025, a 13.5% increase over its record-breaking 2024. European markets remain the backbone of this growth; arrivals from France and the UK have surged by 18% and 25% respectively this year, fuelled by over 120 new air routes and a growing interest in Morocco's diverse cultural heritage.



From the Atlas Mountains to the Atlantic coast, Morocco offers vibrant experiences just a few hours from Europe. Our meeting in Rabat demonstrated ECTAA's commitment to bridging the gap between European travel professionals and this global leader in tourism. We extend our sincere gratitude to ONMT for their hospitality and continued trust in our shared vision.



## Launching ECTAA's 2026 Destination Partnership with Czechia

In November 2025, ECTAA finalized a formal agreement with [CzechTourism](#), designating the Czech Republic as the ECTAA Destination Partner for the first semester of 2026. This partnership will culminate in the association's next semi-annual meeting, scheduled for 28–29 May 2026. We are pleased to return to Czechia, following our last meeting held there in 2010.



year increases of 15% and 12% respectively, supported by enhanced regional flight and rail connectivity.

The partnership focuses on the strategic diversification of the Czech tourism offer. Through this collaboration, ECTAA and Czech Tourism aim also to optimize the visibility of the "Czechia" brand across European distribution channels. The May 2026 meeting will provide a platform for European travel professionals to assess the country's updated infrastructure and evaluate new commercial opportunities within the Central European market.



The agreement aligns with a period of sustained growth for the Czech tourism sector. According to 2025 performance data, the country recorded 18.3 million guest arrivals by the end of the third quarter, indicating a steady trajectory toward pre-pandemic levels. European source markets remain the primary contributors to these volumes. Germany continues as the leading market with over 1.8 million visitors, while the United Kingdom and Poland have shown year-on-

## SUPPLIERS

### Welcoming new Industry Partners: WEX and Travel Ledger

In 2025, ECTAA was delighted to welcome two new industry partners, WEX and Travel Ledger, both bringing specialized expertise in payments and financial technology to the European travel ecosystem. Their integration into the association reflects a shared commitment to modernizing financial processes and supporting a more resilient, digitally driven travel industry.

These partnerships are the culmination of longstanding efforts and permanent informal exchanges maintained by the Secretariat throughout the year. Beyond formal agreements, the Secretariat engages in continuous dialogue with industry stakeholders to identify synergies that align with the evolving needs of our members. Such proactive engagement ensures that when a formal partnership is signed, it is built on a foundation of mutual trust and a deep understanding of the technical challenges facing the sector.

#### WEX: Optimizing Financial Resilience

As a global leader in payment solutions, WEX provides virtual card and payment processing services specifically tailored to the travel sector. Their tools assist travel agents and tour operators in managing payments securely, improving liquidity, and reducing exposure to financial risk. Through this partnership, ECTAA and WEX have facilitated constructive knowledge exchanges regarding pay-

ment efficiency and compliance, ensuring members are better equipped to navigate the complex financial landscape of modern distribution.



#### Travel Ledger: Streamlining B2B Settlements

Travel Ledger is transforming business-to-business settlements through its automated platform, which streamlines accounts receivable and payable. By eliminating manual reconciliation, the platform enables more cost-effective transactions across the supply chain. Following the cooperation agreement signed in June 2025, ECTAA and Travel Ledger have collaborated on promoting digital payment strategies,

including webinars and presentations at the semi-annual Meeting in Rabat.



Both WEX and Travel Ledger will be prominent contributors to the ECTAA Travel Distribution Summit, scheduled for 10–11 February 2026 in Brussels. This summit will provide a dedicated forum for technical deep-dives and B2B networking. Looking ahead, the Secretariat continues to cultivate similar strategic alliances. This ongoing work is expected to result in the announcement of further new partnerships in the coming year, as we continue to expand the range of expertise available to our membership.



## INDUSTRY ORGANISATIONS

Cooperation with industry partners remains a cornerstone of ECTAA's work. In an increasingly complex policy environment, building strong alliances is essential to ensure that the voice of travel agents and tour operators is heard and respected at both European and global levels.

In 2025, ECTAA continued its close collaboration with [EU Travel Tech](#), recognising the many shared priorities and legislative files that impact both organisations. Through coordinated positions, joint advocacy actions, and co-organised events, this partnership has strengthened the sector's influence in discussions on topics such as digital distribution, multimodal travel, and passenger rights.

ECTAA has also worked actively within the [Package Travel Directive \(PTD\) Coalition](#), joining forces with a wide range of tourism stakeholders to amplify the industry's voice. This coalition has been instrumental in presenting joint positions and press releases that underline the need for a fair and workable regulatory framework for travel organisers.

Close cooperation has likewise continued with [EGFATT](#), the European association bringing together national travel guarantee funds. ECTAA provides the Secretariat for EGFATT, facilitating regular exchanges on insolvency protection and financial security mechanisms. This collaboration has proved particularly valuable during the ongoing revision of the Package Travel Directive.

At the global level, ECTAA remains an active member of the [World Travel Agents Associations Alliance \(WTAAA\)](#). This participation ensures that the European travel trade's perspective is represented in international discussions, notably in the dialogue with IATA on airline–agent relations. In 2025, ECTAA contributed to the WTAAA study on professional fees of travel intermediaries, a project aimed at benchmarking practices and strengthening the recognition of travel professionals' value worldwide.

Together with its partners, ECTAA continues to drive a common agenda for a fair, transparent, and forward-looking travel industry.



# EVENTS AND ENGAGEMENT ACTIVITIES IN 2025



# EVENTS AND ENGAGEMENT

## Activities in 2025

2025 was a year rich in events and engagement activities for ECTAA. Building on the success of its first Travel Summit in 2024, ECTAA dedicated the 2025 edition to travel protection, addressing key topics such as payment security, regulatory compliance, and consumer protection within the European travel industry. The Summit, together with the two semi-annual meetings in Macao and Rabat, offered members valuable opportunities for networking, knowledge exchange, and strategic dialogue. In addition, ECTAA organised a series of targeted events, webinars, and podcasts to raise awareness and foster debate on specific policy and industry issues.

### EVENTS

#### ECTAA Travel Protection Summit – February 2025, Brussels

Flagship annual event focusing on travel protection, insurance, and payments, with more than 150 participants from EU institutions and industry leaders. Featured an evening networking reception at the Musée BELvue and a keynote speech by European Commissioner Apostolos Tzitzikostas.



ECTAA Travel Protection Summit – February 2025, Brussels

#### Meeting at the European Parliament on Spanish Royal Decree

Meeting jointly organised by ECTAA and ACAVe at the European Parliament with MEPs Borja Giménez Larraz and Elena Nevado del Campo to challenge the legality of Spain's Royal Decree 933/2021.

#### 'Enabling Seamless Travel: Onboarding EU Multimodal Ticketing Journey' - April 2025

Co-organised with EU Travel Tech, bringing together EU and industry speakers on integrated mobility solutions.

#### 130th Semi-Annual Meeting of ECTAA, Macao, China - June 2025

Focused on Asia–Europe tourism cooperation, digital distribution, and sustainable growth in long-haul travel markets.



ECTAA team, Macao

#### Webinar on NIS2 Cybersecurity Directive – September 2025

Designed to explain new cybersecurity obligations for travel intermediaries

## Webinar on B2B Travel Payments – September 2025

Brought together Travel Ledger, Advantage Travel Partners, and Carnival UK to discuss innovation in travel payment systems.



Webinar on B2B Travel Payments – September 2025

## Natter online discussion - October 2025

Interactive online discussion with Natter to gather industry input on key themes such as artificial intelligence, payments, and customer loyalty.

## 131st Semi-Annual Meeting of ECTAA, Rabat, Morocco - November 2025

Addressed sustainability, inclusive tourism, and the role of AI and professional fees in the travel distribution model.

## PODCAST SERIES

### ECTAA on Policy, Innovation and Industry Trends with Eric Drésin - February 2025

Eric Drésin discusses the impact of the EU 2024 elections on EU travel policy and ECTAA's key advocacy efforts.

### Shaping the future: PTD Campaign and Ambassador programme with Anna Lenhammer and Kim Butigan – April 2025

In this episode, Anna Lenhammer and Kim Butigan discuss ECTAA's position on the revision of the Package Travel Directive and the role of ECTAA Ambassador Programme.

### Sustainable Travel with Frank Oostdam – May 2025

Frank Oostdam explores the revision of the Package Travel Directive and the growing push for sustainable travel. What do the proposed changes mean for consumer and industry? How are travel agents responding to climate demands? What's next for ECTAA's in shaping Europe travel future?



Sustainable Travel with Frank Oostdam – May 2025



# SUMMER CAMPS FOR UKRAINIAN CHILDREN



# SUMMER CAMPS For Ukrainian Children

## United by Heart: Standing with Ukrainian Children

When the travel community comes together, it can change lives. In 2025, ECTAA and its members joined forces to organise five summer and autumn camps for Ukrainian children, offering them safety, friendship, and moments of joy after years of hardship.



Between June and October 2025, 216 children spent unforgettable days in Belgium, Croatia, Denmark, Latvia, Poland, and Sweden. The camps' programmes included river cruises, amusement park visits, seaside trips, cultural excursions, and creative workshops — giving participants the precious chance to simply be children again.



The project was initiated by SRF (Sweden) and AITO (Ukraine) and coordinated under ECTAA's umbrella with the support of UHPA (Croatia), FIT (Finland), DRF (Denmark), ALTA (Latvia), PIT (Poland) and FIT (Belgium). Together, these associations mobilised volunteers, industry partners, and local authorities to provide accommodation, meals, and recreational activities.

ECTAA extends its heartfelt thanks to the associations whose dedication and financial support made these camps possible. Their collective effort has brought comfort and joy to these very deserving children and stands as a proud example of the travel community's solidarity and humanity.



At a time when millions of Ukrainian children are facing fear, uncertainty, displacement, and loss, the tourism sector demonstrated its broader responsibility to society by becoming a source of protection, care, and hope.

This initiative reaffirmed that tourism is not solely about travel; it is about people — about standing with children and upholding their fundamental right to safety, joy, and a future.

This is the true power of tourism.

This is Europe standing with Ukrainian children.



**AITO – Association of Incoming Tour Operators**



# A LOOK TOWARDS 2026

# ECTAA WORK PROGRAMME

ECTAA's work in 2026 will be shaped by the legislative and non-legislative initiatives outlined in the European Commission's Work Programme. With the Package Travel Directive (PTD) entering its final phase of adoption, ECTAA will focus on supporting Members to ensure a smooth and consistent implementation of the new rules across Europe. At the same time, several new proposals will require close attention — including the long-awaited revision of the VAT rules for travel agents and renewed discussions on airline failure protection, both key priorities for ECTAA's advocacy efforts. Below is a non-exhaustive list of the relevant topics in 2026.

## Internal Market and Consumer Protection

- Adoption and implementation of Package Travel Directive.
- Action Plan for Consumers in the Single Market.
- Review of the Geoblocking Regulation.
- Review of the Consumer Protection Cooperation Regulation.

## Transport & distribution

- Revision of Air Passenger Rights Regulation.
- Adoption of enforcement and new multimodal passenger rights proposals.
- Multimodal Digital Mobility Services proposal.
- Single Digital Booking and Ticketing Regulation proposal.
- Revision of Rail Passenger Rights Regulation.
- Revision of the Air Services Regulation.

## IATA

- Participation in the PAPGJC and observing PAConf.
- Monitoring of developments in the Passenger Agency Programme (PAP).
- Advising on improvements to the PAP according to agent requirements.
- Monitoring of the developments around NDC and Modern Airline Retailing.

## Digital and data protection

- Spanish Royal Decree.
- Digital Fairness Act.
- European Tourism Data Space.
- Taxation.

## Revision of special VAT scheme for travel agents

- Revision of VAT rules for passenger transport services.
- Explanatory Notes on the ViDA platform rules.
- Omnibus proposal on taxation.

## Tourism and sustainability

- European Sustainable Tourism Strategy.
- Green Claims Directive proposal.

## Home Affairs:

- European Travel Authorisation .
- European Travel Information and Authorisation System.

## Destination issues:

- Destination issues, such as health and safety, travel restrictions, taxes and fees, etc.

# ECTAA TRAVEL DISTRIBUTION SUMMIT

The ECTAA Travel Distribution Summit, taking place on 10–11 February 2026 in Brussels, will be the key industry event of the year, bringing together travel professionals, technology experts, and policymakers to discuss the future of travel distribution in Europe.

Following the success of previous editions dedicated to travel payments and travel protection, the 2026 Summit will focus on the growing complexity of travel distribution, from digital transformation and AI innovation to evolving payment systems, competition, and consumer protection. Over 130 senior executives from leading companies, including airlines, tour operators, technology providers, and global payment partners, are expected to join discussions through interactive masterclasses, expert panels, and closed-door roundtables.

ECTAA warmly invites all Members, partners, and industry stakeholders to take part in this flagship event and contribute to shaping the next chapter of travel distribution.

Programme and registration details are available at [www.ectaa.org](http://www.ectaa.org)



ECTAA's Travel Protection Summit 2025



## ECTAA STRATEGY 2030

ECTAA has launched a strategic reflection process to define its Strategy 2030, a roadmap that will guide the association's priorities and actions for the coming years. Initiated in 2025 at the conclusion of the previous multiannual programme (2021–2025), the process was prepared by the Executive Board and the Secretariat and submitted to the Board of Directors for discussion.

The objective of the new strategy is to ensure that ECTAA remains a strong and forward-looking voice for Europe's travel agents and tour operators in a rapidly evolving environment. In recent years, significant progress has been made on the strategy's core objectives, notably in strengthening EU advocacy, communication, and member services. During the strategic review held on 18 November in Rabat, the Board of Directors reaffirmed members' support for an ECTAA that is proactive, data-driven, and increasingly influential — in short, offering intelligence as a service to the industry.

To achieve this, ECTAA will redefine its core mission around proactive, evidence-based advocacy, strengthening its position as the authoritative voice for European travel companies. This includes moving from reactive monitoring to predictive legislative monitoring. To reinforce this influence, the association will develop a data strategy and secure strategic partnerships to generate the data required for effective lobbying. This data-driven approach will be complemented by integrating strategic communication.

Internally, ECTAA will streamline operations through a strict subsidiarity principle: the Secretariat will focus on high-stakes European matters, while national associations will lead on country-specific activities.

Financial resilience also remains a top priority. The association will ensure operational sustainability while gradually rebuilding reserves, which were used during the COVID-19 crisis to help mitigate its impact on the industry and its members.

The new Strategy 2030 will be finalised and formally adopted in the course of 2026.



# ECTAA BODIES & MEMBERS & PARTNERS

# EXECUTIVE BOARD 2024-2026

Frank Oostdam, **President** (NL)

Heli Mäki-Fränti, **Vice-President** (FI)

Jan Van Steen, **Treasurer** (BE)

Daniela Stoeva, **Member of Executive Board** (BG)

Marios Kammenos, **Member of Executive Board** (GR)

Boris Zgomba, **Member of Executive Board** (HR)

Pawel Niewiadomski, **Member of Executive Board** (PL)



Executive Board of ECTAA

## ECTAA TECHNICAL COMMITTEES

- Legal Committee – Chair Anne Dolan (IRL) and Vicechair Jakob Hahn (DK)
- Air Matter Committee – Chair Isabelle Rech-Francis (FR) and Vicechair Walter Schut (NL)
- Technology Working Group – Chair George Cioceanu (RO)
- Sustainability Committee – Chair Frank Radstake (NL) and Vicechair Susan Deer (UK)
- Tourism Committee – Chair Nicholas Kelaiditis (GR) and Vicechair Gabriele Milani (IT)
- Fiscal Committee – Chair Marios Kammenos (GR)

## ECTAA SECRETARIAT



ECTAA Secretariat

Eric Drésin, **Secretary General**

Christina Russe, **Deputy Secretary General**

Benoît Chantoin, **Director Legal and Consumer Affairs**

Christian Möller, **Director Transport and Distribution**

Anne Dhoop, **Executive Assistant**

# LIST OF MEMBERS

Thank you to our members for their unwavering support

## Full Members



## Affiliated Members



## Allied Members





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