

SUSTAINABLE TOURISM IN POST-PANDEMIC EUROPE: TRENDS AND CHALLENGES

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Abstract

The COVID-19 pandemic profoundly disrupted global tourism, exposing long-standing structural vulnerabilities while accelerating policy and academic debates on sustainability and resilience. This paper examines the evolution of sustainable tourism in Europe during the post-pandemic period (2020–2025) through a qualitative documentary analysis. Drawing on institutional reports from UN Tourism, the World Travel & Tourism Council, Eurostat, the OECD, and key European policy frameworks, the study explores emerging trends, governance responses, and persistent implementation challenges associated with sustainable tourism recovery. The findings reveal a gradual reorientation toward sustainability, reflected in the growth of domestic and proximity-based tourism, increased attention to environmental management and green certification schemes, and the expanding role of digitalisation in destination governance. However, this transition remains uneven and conditional. Structural barriers—including disparities in governance capacity, limited access to funding and digital tools for small and medium-sized enterprises, and pronounced regional inequalities—continue to constrain the effective operationalisation of sustainability objectives. Moreover, the rapid re-emergence of overtourism in major destinations highlights an unresolved tension between short-term economic recovery imperatives and long-term environmental and social sustainability goals. The paper concludes that while post-pandemic Europe presents a critical window of opportunity for advancing sustainable tourism, meaningful transformation depends on strengthening multi-level governance, improving policy–practice alignment, and fostering inclusive collaboration among policymakers, tourism businesses, and local communities.

Keywords: sustainable tourism, post-pandemic recovery, Europe, green transition, policy analysis

JEL Classification: L83, Q01, Z32

1. Introduction

The COVID-19 pandemic represented an unprecedented disruption to the global tourism industry, generating widespread travel restrictions, severe revenue losses, and significant socio-economic impacts. In Europe, where tourism plays a critical role in regional development and employment, tourism-dependent economies were particularly exposed to the crisis. At the same time, the pandemic acted as a catalyst for re-evaluating prevailing growth-oriented tourism models,

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intensifying debates around sustainability, resilience, and long-term structural transformation.

As travel gradually resumed, sustainable tourism gained renewed prominence as a strategic priority within European recovery agendas. This shift has been closely aligned with broader policy frameworks such as the European Green Deal and the United Nations Sustainable Development Goals, which emphasise decarbonisation, inclusiveness, and responsible resource management. In this context, sustainability has increasingly been framed not merely as an environmental objective, but as an integrated approach linking economic viability, social equity, and environmental responsibility in post-pandemic tourism development.

Against this background, this paper examines the evolution of sustainable tourism in Europe during the post-pandemic period, with particular attention to the trends that have emerged between 2020 and 2025 and the structural challenges that continue to shape this transformation. By analysing recent academic literature, policy frameworks, and institutional responses, the study seeks to provide a systematic overview of how sustainability principles have been incorporated into tourism recovery strategies and to identify the key barriers that may hinder their effective implementation across European destinations.

2. Literature review

2.1. Defining sustainable tourism

Sustainable tourism represents a core pillar in contemporary tourism studies, addressing the need to balance economic viability, social equity, and environmental protection within tourism development (Hall, 2022). The concept emerged in response to growing environmental awareness during the 1960s and 1970s, as scholars increasingly criticized the negative externalities associated with mass tourism, including environmental degradation, cultural commodification, and uneven economic benefits. Early contributions by authors such as Jost Krippendorff emphasized the necessity of reorienting tourism toward more responsible and ethically grounded forms of development (Krippendorff, 1975).

The global institutionalization of sustainable tourism was significantly shaped by the 1992 Rio Earth Summit, which integrated sustainability principles into international development agendas. Within this broader framework, tourism was increasingly conceptualized as an activity that should support environmental conservation, cultural authenticity, and long-term socio-economic development, rather than short-term growth alone. This marked the transition of sustainable tourism from a normative critique of mass tourism to an established paradigm within academic and policy discourse.

A widely accepted definition of sustainable tourism is provided by UN Tourism (formerly UNWTO), which defines it as tourism that “takes full account of its current and future economic, social and environmental impacts,” while

addressing the needs of visitors, the tourism industry, the environment, and host communities (UN Tourism, 2023). This definition is grounded in three interdependent dimensions: environmental responsibility, socio-cultural integrity, and economic viability (UN Tourism, 2020). Importantly, the literature emphasizes that these dimensions should be pursued in an integrated manner, as privileging one dimension at the expense of others risks undermining the overall sustainability of tourism development (Streimikiene et al., 2021). Fennell and Cooper (2020) emphasise that sustainable tourism should be understood not merely as a technical framework for impact management, but as a normative and ethical concept grounded in principles of responsibility, equity, and long-term stewardship. From this perspective, sustainability in tourism entails moral obligations toward host communities, future generations, and non-human nature, extending beyond compliance with standards or performance indicators.

From an operational perspective, the principles of sustainable tourism are further articulated through the Global Sustainable Tourism Council (GSTC) Criteria, which translate the conceptual foundations of sustainability into measurable standards applicable to destinations, tourism businesses, and policymakers. The GSTC framework structures sustainable tourism around four core pillars: sustainable management, socio-economic benefits for local communities, cultural heritage preservation, and environmental stewardship (GSTC, 2022). These pillars reflect an effort to operationalize the multidimensional nature of sustainability, while acknowledging that measurement and implementation remain uneven across contexts. Navarro et al. (2020) highlight that sustainable tourism assessment gains analytical relevance when conducted at local scales, reflecting contextual variations in social, economic, and environmental conditions. In the European context, this underscores that indicators designed for sustainability must be sensitive to territorial specificities rather than relying solely on broad, aggregated measures.

Recent contributions further emphasize that sustainable tourism should be understood as a continuous and adaptive development process rather than a fixed end-state (Hall et al., 2020). Strengthening sustainability in tourism requires incremental and consistent actions over time, including problem identification, strategic planning, implementation, and ongoing adjustment in response to evolving economic, social, and environmental conditions (Streimikiene et al., 2021). At the same time, critical scholarship cautions against the unreflective reliance on measurement and standardized indicators. Drawing on Scott's (1998) and Porter's (1995) analyses of quantification and governance, the literature suggests that the objectification of complex social processes through indicators can depoliticize decision-making by shifting attention from value-based debates to technical compliance. In the context of sustainable tourism, this risk implies that indicator-driven approaches may obscure normative questions related to equity, cultural integrity, and community well-being, which are central to the conceptual foundations of sustainability.

2.2. Tourism and Resilience after COVID-19

Recent empirical research conceptualises tourism resilience as a multidimensional construct encompassing both planned (proactive) and adopted (reactive) responses to crisis. Azzaz and Elshaer (2024) demonstrate that resilience emerges from the alignment of preparedness, strategic planning, and adaptive capacity, suggesting that destinations and tourism businesses are more resilient when they combine anticipatory measures with flexible, experience-based adaptation during crises. Within the resilience literature, recovery is increasingly framed not as a return to pre-crisis conditions but as a process of adaptation and transformation. Drawing on the resilience cycle and typologies of resilience, Baraero-Era and Del Rosario (2020) argue that effective tourism resilience is grounded in the capacity of tourism systems to reorganise and innovate in response to shocks, rather than simply restoring previous growth patterns. In the context of COVID-19, resilience is thus conceptualised as the ability of tourism systems to transition toward more sustainable development pathways.

Against this conceptual background, recent studies (Gössling et al., 2021; Hall, 2022) highlight that the pandemic accelerated debates around resilience, low-carbon travel, and the need to “build back better.” Concepts such as slow tourism, proximity tourism, and digital sustainability gained prominence across European destinations as practical expressions of adaptive responses. Empirical evidence supports these shifts in travel behaviour. Corbisiero and Monaco (2021) report a growing preference for nearby destinations, open spaces, and short-duration trips, suggesting that proximity tourism and micro-vacations function as resilience strategies that allow tourism activity to continue under conditions of prolonged uncertainty.

The COVID-19 crisis also exposed the structural vulnerability of mass-tourism-oriented destinations, reinforcing calls for a strategic reorientation of tourism development models. According to Traskevich and Fontanari (2023), destination resilience is strengthened through a shift toward local resources, regional value chains, and authentic place-based assets. This reorientation not only supports sustainability objectives but also enhances destinations’ capacity to withstand future systemic shocks. Similarly, Sharma et al. (2021), drawing on a systematic review of early COVID-19 tourism research, conceptualise resilience as a bridging concept between immediate crisis management and long-term structural transformation. Rather than restoring pre-pandemic growth trajectories, post-COVID resilience is associated with reorienting tourism systems toward sustainability, local embeddedness, and reduced environmental pressure (Higgins-Desbiolles, 2021). Resilience is further understood as a multi-level and inclusive process, dependent on coordinated governance, stakeholder collaboration, and community involvement. At the destination level, community perceptions and flexible governance arrangements play a critical role in shaping adaptive recovery pathways (Brochado, 2023). Beyond structural and

institutional dimensions, the literature also emphasises well-being as a component of psychological resilience among both tourists and residents coping with pandemic-induced disruptions (Pocinho et al., 2022).

Empirical assessments at local scales reiterate that contextualised measurement is essential to understanding how resilience manifests unevenly across regions, linking sustainable practices with adaptive capacity (Navarro et al., 2020). Systematic reviews of the post-pandemic sustainability literature further reveal an increased focus on stakeholder engagement and capacity building as core elements of resilient tourism systems (Ekka & Annamalai, 2022). At the same time, evidence indicates that resilience during the pandemic was uneven across economic sectors. Ntounis et al. (2022) show that tourism and hospitality businesses face distinctive structural constraints related to demand volatility, seasonality, and prolonged uncertainty, suggesting that resilience-oriented recovery policies must be tailored rather than uniform.

2.3. European Policy Framework

The post-pandemic recovery of European tourism is increasingly framed through sustainability-oriented strategies rather than conventional growth restoration. As argued by Orîndaru et al. (2021), the pandemic exposed structural vulnerabilities that necessitated a transition toward recovery models integrating safety, long-term resilience, and environmental stewardship into core policy and business decision-making. Within this context, the European Union has developed a multi-layered policy architecture designed to align tourism recovery with broader climate and digital transformation objectives.

At the strategic level, tourism-related policies are grounded in the European Green Deal (European Commission, 2019), which sets the overarching objective of achieving climate neutrality by 2050. Its core principles—decarbonisation, circular economy, and biodiversity protection—are increasingly embedded into tourism planning through unprecedented financial instruments, most notably the NextGenerationEU recovery package. Through the Recovery and Resilience Facility, this framework has provided the financial backbone for the green transition, enabling the funding of tourism projects that prioritise sustainable infrastructure, digital innovation, and climate adaptation (OECD, 2023).

Building on these foundations, the Transition Pathway for Tourism (European Commission, 2022) serves as the primary sector-specific strategic instrument, identifying 27 areas of action aimed at accelerating the so-called “twin transition” (green and digital). The Pathway promotes circular business models, the reduction of the sector’s environmental footprint, and the expanded use of digital tools to improve destination management and visitor flow control. This strategic direction is further institutionalised through the European Agenda for Tourism 2030 (Council of the European Union, 2022), which outlines a

long-term framework for cooperation among EU institutions, industry stakeholders, and local communities.

Taken together, these policy instruments signal a shift from promotion-oriented tourism governance toward a management-based and resilience-focused approach. This transition places increasing emphasis on workforce upskilling, destination management capacity, and long-term resilience as core pillars of sustainable tourism development in the post-pandemic European context (WTTC, 2023).

3. Methodological Approach

This study adopts a qualitative documentary analysis to examine the evolution of sustainable tourism in Europe during the post-pandemic period (2020–2025). By drawing on secondary data from institutional reports, policy documents, and peer-reviewed academic literature, the research provides an integrated perspective on the intersection of tourism recovery and sustainability. The empirical basis of the study includes strategic reports published by international organizations such as UN Tourism, the World Travel & Tourism Council (WTTC), and the OECD, alongside key European policy frameworks like the European Green Deal and the Transition Pathway for Tourism.

To ensure a systematic and rigorous evaluation, the documentary research was conducted in three distinct phases (Table 1 outlines the main categories of sources used and clarifies their respective analytical roles in this process). First, a purposive sampling approach was used to select high-level institutional reports and strategic frameworks that define the European tourism recovery agenda. Second, these documents were subjected to qualitative thematic analysis, with codes inductively derived from the texts to identify recurring themes such as the "digital divide" and "conditioned sustainability". This process allowed for the identification of dominant trends, policy orientations, and persistent challenges in the implementation of sustainable practices across European destinations.

Table 1. Source mapping for the documentary analysis

Source type	Main contribution to the analysis	Analytical role
UN Tourism & WTTC reports	Evidence on post-pandemic tourism trends, sustainability priorities, and economic impact.	Identification of macro-level trends and global strategic directions.
European Commission policy documents	Strategic frameworks (Green Deal, Transition Pathway), governance instruments, and funding mechanisms.	Assessment of policy-practice alignment and institutional architecture.

Eurostat & OECD indicators	Contextual data on tourism activity (2024-2025), occupancy levels, and regional disparities.	Empirical contextualisation and validation of qualitative trends.
Academic literature (2020–2025)	Theoretical frameworks, critical interpretations of "conditioned sustainability," and resilience models.	Conceptual interpretation and discussion of findings, and identification of research gaps.

Source: made by author

Finally, the findings were triangulated with the latest quantitative indicators from Eurostat (2025) to validate observed qualitative trends against actual market performance. This multi-stage approach allowed for an interpretative assessment that moves beyond a purely descriptive summary toward a critical evaluation of policy-practice alignment. The study does not seek to test specific hypotheses but rather to provide a systematic overview of tourism transformation, with particular attention to governance capacity, stakeholder coordination, and regional disparities.

4. Findings and Discussion

This section presents the main findings of the documentary analysis, focusing on the key trends and challenges shaping sustainable tourism in post-pandemic Europe. The results are organised thematically in order to capture both areas of convergence and persistent implementation gaps.

The following table synthesizes the core findings of the documentary analysis, highlighting the interplay between emerging trends and persistent structural barriers. To provide a more nuanced perspective, an "Implementation Level" column has been added, reflecting the gap between strategic policy ambitions and the practical operationalization of sustainability across European destinations. This assessment ranges from "High" (where strategic alignment and funding are robust) to "Low" (where practical execution faces significant resistance or resource constraints), illustrating that post-pandemic tourism transformation remains an uneven and conditional process.

Table 2. Key trends and challenges in post-pandemic sustainable tourism in Europe (2020–2025)

Analytical dimension	Key trends	Main challenges	Implementation Level	Key sources
Tourism demand patterns	Growth of domestic, proximity-based and rural tourism	Limited planning capacity in peripheral destinations	Medium	UN Tourism (2023); Eurostat (2025); Gössling, Scott and Hall (2021)

<i>Environmental sustainability</i>	Increased focus on eco-labels and green practices	Low adoption among SMEs due to cost and awareness barriers	Medium / Low	GSTC (2022); European Commission (2022)
<i>Digitalisation</i>	Expansion of digital tools in destination management	Digital skills gaps and uneven implementation	Medium	European Commission (2022); WTTC (2023)
<i>Governance and funding</i>	Availability of EU recovery funds for sustainable tourism	Uneven absorption capacity across regions	High (Strategic) / Low (Operational)	European Commission (2022); OECD (2023)
<i>Spatial impacts</i>	Renewed pressure on major destinations	Re-emergence of overtourism	Low	Gössling, Scott and Hall (2021); UN Tourism (2024)

Sources: made by author

4.1. Reconfiguration of tourism demand and the rise of place-based travel

The post-pandemic period has been characterized by a significant reconfiguration of tourism demand across Europe, marked by a decisive shift toward domestic, proximity-based, and rural travel. This trend reflects not only the residual effects of pandemic-era mobility restrictions but also a structural evolution in traveler preferences toward "slow tourism" and experiences perceived as more authentic and environmentally responsible. Institutional reports and academic literature (Hall, (2022); Eurostat, (2024) identify this shift as a strategic opportunity to reduce the carbon footprint of the sector by decreasing reliance on long-haul aviation and redistributing economic benefits to peripheral regions.

However, the sustainability implications of this "spatial rebalancing" are complex and inherently uneven. While rural destinations benefit from new revenue streams, many are currently facing an "institutional lag," lacking the infrastructure, regulatory frameworks, and planning capacity required to absorb sudden visitor influxes. As a result, the transition toward place-based tourism does not inherently guarantee positive sustainability outcomes. Without robust destination-level governance and strategic stakeholder coordination, there is a significant risk that post-pandemic demand shifts will merely displace environmental and social pressures from traditional hubs to fragile ecosystem and unprepared local communities. Consequently, as noted by Gössling et al. (2021), the "rural turn" in European tourism necessitates a transition from passive growth absorption to active, resilience-oriented destination management.

4.2. Environmental management, green certifications, and the operationalisation of sustainability

A second major trend identified in the post-pandemic European tourism landscape is the growing emphasis on environmental management tools and green certification schemes. Eco-labels, such as Green Key and the EU Ecolabel, have gained prominence as signaling mechanisms for environmental commitment, aiming to align tourism operations with standardized sustainability metrics. This development reflects a theoretical convergence between environmental management systems (EMS) and European policy frameworks that promote voluntary certification as a primary tool for steering industry behavior toward the objectives of the Green Deal (European Commission, (2022)).

Despite their growing visibility, the effectiveness of these schemes remains constrained by significant structural paradoxes. Small and medium-sized enterprises (SMEs), which constitute over 90% of the European tourism sector, face disproportionate financial, administrative, and informational barriers to certification uptake. As a result, green labels often become exclusive markers for larger or better-resourced operators, leading to a "sustainability elitism" that limits the transformative potential of these tools at a systemic level. This divergence underscores a central challenge of post-pandemic tourism: the operationalisation of sustainability. As noted by Gössling et al. (2021), without simplifying access and providing targeted support for smaller actors, green certifications risk becoming mere marketing instruments rather than drivers of substantive environmental change. Consequently, translating normative sustainability goals into inclusive and scalable operational practices remains a critical gap in the current European tourism governance architecture.

4.3. Digital transformation as a sustainability enabler—and its limits

Digitalisation has emerged as a central pillar of post-pandemic tourism recovery strategies in Europe, frequently framed as a key enabling factor for the "twin transition" toward a green and resilient sector. Digital tools, such as smart mobility systems, visitor management platforms, and data-driven monitoring solutions, are increasingly promoted as essential means for optimizing resource use, mitigating overcrowding, and improving decision-making at the destination level (European Commission, 2022). Consequently, both policy documents and academic literature highlight digital transformation as a vital component of the sector's sustainability agenda. Nevertheless, the relationship between digitalisation and sustainability is not inherently linear. While digital tools offer significant potential, their implementation remains deeply uneven across regions and types of tourism enterprises.

Small and medium-sized enterprises (SMEs), which dominate the European tourism landscape, often face financial, technical, and institutional barriers to

adopting advanced digital solutions. As a result, digitalisation risks reinforcing existing disparities—creating a persistent "digital divide"—rather than reducing them. To prevent this divide from marginalizing smaller operators, European policies must evolve toward integrated support systems that ensure digital transformation contributes meaningfully to sustainable outcomes. As suggested by the WTTC (2023), one essential approach involves the implementation of tailored digitalization vouchers for micro-operators, covering not only software acquisition but also professional consultancy. Furthermore, the establishment of regional innovation hubs could allow SMEs to access shared market data and technical expertise, thereby reducing individual R&D costs. This should be complemented by a reduction in administrative barriers for the absorption of funds from initiatives like NextGenerationEU, ensuring they match the limited administrative capacity of small firms. Ultimately, subsidizing continuous upskilling programs in data analytics and sustainability monitoring is crucial to ensuring that technology acts as a socio-economic equalizer rather than a barrier to entry.

4.4. Governance capacity, funding instruments, and regional disparities

The analysis reveals that governance capacity is the decisive factor in shaping post-pandemic sustainable tourism trajectories across Europe. While European-level funding instruments, most notably NextGenerationEU and REPowerEU, have allocated unprecedented resources to green and digital tourism initiatives, the transition remains hindered by an "asymmetric implementation" across the Union. In principle, these macro-level mechanisms provide a robust financial foundation for a sustainability-oriented recovery; however, in practice, significant disparities persist in the ability of regions to effectively absorb and deploy these funds (European Commission, 2022).

Northern and Western European destinations generally exhibit higher institutional coordination, mature sustainability frameworks, and superior administrative capacity, allowing for a more seamless alignment with EU strategic goals. In contrast, many regions in Southern and Eastern Europe face structural challenges characterized by fragmented governance, limited technical expertise, and constrained access to tailored support for tourism SMEs. These disparities create a "structural divergence" between the ambitious strategic objectives defined at the Brussels level and the operational realities at the local destination level. As highlighted by the OECD (2023), without targeted technical assistance and a simplification of administrative procedures, the current funding architecture risks exacerbating existing regional inequalities rather than fostering a cohesive European green transition. Consequently, the effectiveness of the European tourism recovery depends less on the availability of capital and more on the strengthening of multi-level governance and local administrative resilience.

4.5. The re-emergence of overtourism and the recovery–sustainability tension

Despite widespread discourse on sustainability and resilience, the post-pandemic recovery has been accompanied by the rapid re-emergence of overtourism in several iconic European destinations. The pressure on these locations is further evidenced by record-breaking occupancy levels; according to Eurostat (2025), the European tourism sector reached a historical peak in 2024, surpassing 3 billion guest nights for the first time. The fact that international tourism has surged by nearly 5% year-on-year explains why high visitor concentrations have returned so aggressively to cities such as Venice, Barcelona, and Paris, placing renewed pressure on local infrastructure, housing markets, and resident well-being. This development illustrates a fundamental tension between short-term economic recovery imperatives and long-term sustainability goals. These figures suggest that the sector has not only recovered but is now operating beyond its pre-pandemic capacity, making the decoupling of growth from environmental impact an urgent necessity rather than a theoretical goal. While tourism revenues remain essential for post-crisis economic stabilization, prioritizing rapid growth risks undermining the very environmental and social objectives outlined in recovery plans.

The persistence of these challenges raises a critical question: is the green transition a genuine structural shift or merely a post-pandemic marketing tool? While institutional discourse, such as the European Green Deal, places sustainability at the heart of recovery, operational realities often suggest a "conditioned sustainability" dictated by immediate economic liquidity needs. As noted by Higgins-Desbiolles (2021), there is a persistent risk that sustainability principles are being co-opted as branding mechanisms to attract high-yield market segments, while the underlying business model remains dependent on mass volume. Ultimately, the re-emergence of overtourism indicates that sustainability-oriented rhetoric has not yet been fully embedded in tourism governance practices. A truly structural transformation would require a move beyond promotional strategies toward rigorous destination management, regulatory interventions, and inclusive stakeholder engagement that prioritize local well-being over short-term revenue. Taken together, these findings suggest that sustainable tourism in post-pandemic Europe is best understood as a *conditional transition* rather than a linear transformation.

While there is a clear convergence across theory, policy, and strategic discourse regarding the importance of sustainability and digital innovation, significant divergences emerge at the level of implementation. These gaps are shaped by structural constraints such as governance capacity, funding accessibility, and regional inequalities. The post-pandemic period has created a window of opportunity for reorienting European tourism toward more sustainable pathways; however, whether this results in substantive transformation or

incremental adjustment depends largely on the ability of institutions to bridge the gap between strategic ambition and operational practice.

5. Conclusions

The COVID-19 pandemic has acted as a critical turning point for European tourism, exposing long-standing structural vulnerabilities while simultaneously accelerating the integration of sustainability into recovery strategies. This study has examined the evolution of sustainable tourism in post-pandemic Europe (2020–2025) through a qualitative documentary analysis, identifying key trends and persistent challenges shaping the sector's transformation. The findings indicate that European tourism is undergoing a gradual reorientation toward sustainability, reflected in shifts toward domestic and place-based travel, increased attention to environmental management, and the growing role of digitalisation in destination governance. These developments suggest a broad convergence between sustainability theory, European policy frameworks, and strategic discourse at the institutional level.

However, the analysis also reveals significant divergences between policy ambitions and implementation outcomes. Structural constraints—such as uneven governance capacity, limited access to funding for small and medium-sized enterprises, and pronounced regional disparities—continue to hinder the effective operationalisation of sustainability principles. Moreover, the re-emergence of overtourism in major destinations highlights an unresolved tension between short-term economic recovery objectives and long-term environmental and social sustainability goals. These challenges demonstrate that sustainability in post-pandemic European tourism remains conditional and context-dependent rather than universally embedded.

From a policy perspective, the results underscore the need for stronger multi-level governance and targeted capacity-building measures that move beyond simple financial instruments. Inclusive support mechanisms, institutional coordination, and robust monitoring systems are essential to translate strategic commitments into practical outcomes at the destination level. From a research perspective, this study contributes an integrated analysis of trends across Europe, emphasizing that governance capacity is the primary driver of sustainability transitions.

Despite the comprehensive nature of this documentary analysis, certain limitations must be acknowledged. The study relies primarily on high-level institutional data and secondary literature, which may not fully capture the granular, day-to-day operational challenges faced by micro-enterprises. Furthermore, given the rapidly evolving nature of the recovery, the long-term impacts of currently implemented policies remain to be fully observed. Consequently, future research should address these gaps by employing longitudinal case studies to assess how sustainability policies are enacted in

diverse socio-economic contexts. Additionally, empirical studies focusing on the "digital divide" among tourism SMEs could provide deeper insights into the specific capacity-building measures required for an inclusive green transition. Finally, investigating resident sentiment in the context of re-emerging overtourism would contribute to a more holistic understanding of social sustainability in post-pandemic Europe. Overall, the post-pandemic period represents a critical window of opportunity; whether this leads to a meaningful transformation depends on the sector's ability to bridge the gap between strategic ambition and operational practice.

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