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«ХАРКІВСЬКИЙ ПОЛІТЕХНІЧНИЙ ІНСТИТУТ»

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STARTUP PROJECTS IN THE FIELD OF TOURISM AND HOSPITALITY: A COMPARATIVE ANALYSIS OF EUROPEAN UNION COUNTRIES

Tourism and hospitality are among the key sectors of the European Union's economy, providing a significant contribution to the gross domestic product and employment for millions of citizens. According to Eurostat data for 2023, this sector accounted for approximately 10 % of the EU's GDP, and the post-COVID-19 recovery has stimulated the intensification of innovation processes [1, p. 15]. Technologically oriented startups, known as traveltech, play a decisive role in the transformation of the industry by offering solutions for digital booking, sustainable tourism, personalized services, and artificial intelligence integration. The relevance of this study is determined by the growing interest of investors in traveltech startups within the EU, where investment volume in 2024 exceeded 2 billion euros, with an emphasis on digitalization and environmentally sustainable technologies [2, p. 6]. However, the distribution of such projects across EU countries remains uneven: leading positions are held by states with developed entrepreneurial ecosystems such as Germany, Spain, and France, while Eastern European countries show slower development rates.

The aim of the study is to conduct a comparative analysis of startup projects in the tourism and hospitality sector across EU countries in order to identify key trends, success factors, and regional differences. The research is based on the analysis of secondary data from World Tourism Organization reports, Dealroom and Crunchbase databases, as well as scientific publications from 2024-2025. The analysis covers 27 EU countries, with particular attention to Germany as a leader in innovation, Spain with its tourism-oriented economy, France with a focus on mobility, the Netherlands as a hub for digital ecosystems, Italy emphasizing cultural tourism, and Estonia and Poland as examples of emerging digital ecosystems in Eastern Europe [3, p. 2].

Startups in the tourism and hospitality sector represent innovative enterprises that use advanced technologies to optimize booking processes, logistics, service personalization, and sustainable development. According to the World Tourism Organization, traveltech startups employ artificial intelligence, big data, virtual reality, and blockchain to enhance the efficiency of the industry. Entrepreneurial ecosystems in this sector include public policy, financing mechanisms, innovation culture, human capital, and technological infrastructure. In Western European countries, venture investments dominate, whereas in the developing economies of Eastern Europe, government grants prevail. The main challenges include post-pandemic recovery, digitalization, and sustainable development, with research confirming that the integration of environmentally oriented innovations significantly increases the competitiveness of startups. A systematic review of academic literature shows a significant increase in publications on tourism startups since 2020, emphasizing the technological factors of their sustainability and survival.

The research methodology was based on a comparative analysis integrating qualitative and quantitative approaches. Data were collected from Dealroom, Crunchbase, as well as reports from EU-Startups, Statista, Tracxn, and Wellfound. The comparison was conducted according to the number of active startups during 2024-2025, the volume of investments including venture funding and seed rounds, successful cases such as unicorn startups and market entries, and key success factors such as government support policies, research and development, partnerships, and the level of adoption of advanced technologies like artificial intelligence, big data, and virtual reality. Additional focus was placed on sustainability orientation, economic impact through job creation and contribution to gross domestic product, demographic characteristics of founders–including the share of female and youth-led teams–as well as international expansion and export potential. The analysis covers Germany, Spain, France, the Netherlands, Italy, Estonia, and Poland, aggregating data for 2023–2025 and applying methods of descriptive statistics and case study analysis.

Germany holds a leading position in the EU in terms of the number of traveltech startups, with more than 150 active projects as of 2025. Berlin serves as a key hub for attracting highly qualified professionals, and investment volumes in 2024-2025 reached approximately €500 million [4, p. 12]. Among the most successful examples are the tour-booking platform GetYourGuide, which has raised over $600 million, and Omio, specializing in multimodal travel with funding of $400 million. Other significant projects include FlixBus, a budget intercity bus service that has achieved unicorn status; Tier Mobility, which develops environmentally sustainable e-scooters; Distribution Technologies, focused on ticket distribution; Blacklane, offering premium transfers; Headout, supporting active tourism; and TripActions, providing corporate travel management solutions [5, p. 8]. The sector’s success is driven by a strong research and development base, grants from the Federal Ministry of Education and Research, and integration with the automotive industry to promote sustainable tourism, although bureaucratic obstacles continue to slow growth.

Spain, where tourism accounts for 14 % of the gross domestic product, leads in the number of startups, exceeding 200 projects. Barcelona and Madrid serve as the

main hubs of innovative activity, and the volume of investments in 2024 surpassed €700 million, supported by funds such as Caixa Capital. Notable examples include TravelPerk, a corporate travel platform valued at $1 billion; Amadeus, which provides information technology solutions for aviation; Lodgify and Amenitiz, which focus on hotel management; Exoticca, which offers personalized tours; Cooltra, which promotes electromobility; Worldsensing, which integrates the Internet of Things into infrastructure; BEONx, which specializes in revenue management; and Juniper, which develops travel APIs [6, p. 3]. Spain places strong emphasis on the application of artificial intelligence for service personalization and sustainable development, supported by subsidies from the EU NextGenerationEU program.

France hosts around 120 startups with total investments of approximately €400 million, with Paris serving as the main innovation hub. Notable examples include BlaBlaCar, a car-sharing platform founded in 2006 that has raised over $685 million and achieved unicorn status by offering a sustainable solution for shared rides, helping to reduce the carbon footprint and optimize transport costs, with more than 100 million users in 22 countries. Evaneos, launched in 2009, specializes in personalized tours through local agencies, has attracted over €109 million in funding, and serves 300,000 travelers across 160 countries, emphasizing sustainable tourism and becoming the first B Corp company in the industry.

Doctolib, although primarily focused on medical services, contributes to medical tourism through its booking platform, has attracted significant investment, and reached a valuation of $6.4 billion, facilitating access to specialists for travelers. Back Market, a platform for refurbished gadgets, supports sustainability in tourism through eco-friendly devices for travelers, valued at $5.7 billion and focused on waste reduction. Qwant, a privacy-focused search engine, is useful for confidential travel planning, does not track user data, and integrates with travel applications.

Chargemap, a map of electric vehicle charging stations, promotes green tourism with over 1 million points across Europe and the Chargemap Pass service. MWM, a music app developer, enhances hospitality through hotel soundtracks with an emphasis on creativity and music. Papernest, a service management platform, simplifies relocation for tourists and expats, serving 1.5 million users and partnering with banks. Stych, an online driving school, offers lessons for tourists via a booking app and focuses on flexibility.

France’s success is supported by the integration of these startups with the fashion and hospitality industries, as well as state-backed incubators such as Station F, although high tax rates pose certain challenges, partially offset by EU funding.

The Netherlands, with Amsterdam as a leading digital hub, hosts over 100 startups with investments totaling €300 million. Examples include spin-offs from Booking.com, Bob W for AI-driven apartment management, Dott for electric scooters, Tiqets for attraction ticket booking, SnappCar for car sharing, Polarsteps for travel journaling, Tuul for sustainable mobility, and Ridango for public transport systems [7, p. 21]. The emphasis on financial technologies for tourism, such as payment systems, is supported by tax incentives that foster startup development.

Italy has around 80 startups with a total investment of €200 million, concentrated mainly in Rome and Milan. Examples include Musement, a tour

booking platform acquired by TUI; CleanBnB, a short-term rental management service; Radical Storage, a luggage storage platform; Trenitalia, focused on the digitalization of railway transport; BizAway, which organizes business trips; Telepass, a transport payment system; MERMEC Group, specializing in infrastructure development; Casavo, operating in real estate within the hospitality sector; and Exein, which ensures cybersecurity in tourism. Cultural tourism remains the dominant segment; however, digitalization is lagging behind despite support from the PNRR funds for digital transformation [8, p. 12].

Estonia, despite its smaller scale, demonstrates a high level of innovation activity per capita, with around 50 startups attracting investments totalling €150 million. Examples include Bolt in the mobility sector, Snabb for car sharing, Hospitable for hospitality management, YouTravel.me for group travel organization, Bikeep for bicycle parking, Tuul for electric scooters, Ridango for transport systems, HotelBuddy for hotel software, Go4Loyal for loyalty programs, and Rebelroam for providing Wi-Fi during travel [9, p. 11]. The success is driven by deep integration with digital governance systems.

Poland, as an emerging innovation hub of Eastern Europe, hosts around 70 startups with a total investment of €180 million, primarily concentrated in Warsaw and Kraków. Examples include Booksy for hospitality service booking, Hotailors for corporate travel management, Yieldbird for hotel revenue optimization, TourRadar for group tours, Renters for short-term rental management, Transparent Data for tourism analytics, Versum for salon automation serving tourists, and Synerise for personalized marketing [9]. This development is supported by a growing venture ecosystem and government programs such as the Poland Prize, aimed at attracting startups.

A comparative analysis reveals structural and institutional differences among the regions of the European Union in the development of startup ecosystems focused on sustainability and digitalization. Western European countries such as Germany, Spain, France, and the Netherlands account for about 60 % of all EU venture investments, which can be attributed to the high density of innovation clusters, a well-developed R&D funding system, and the effective implementation of EU-wide policies related to the «green transition». In these countries, sustainable entrepreneurship has become a key component of national economic growth strategies, reflected in the prioritization of technological solutions aimed at reducing emissions, improving energy efficiency, and promoting «smart» tourism.

Eastern Europe, including Poland, Estonia, the Czech Republic, and Bulgaria, demonstrates more moderate growth rates in the startup sector, which is largely due to limited access to venture capital, weak institutional support, and the ongoing outflow of skilled professionals. Nevertheless, these countries possess high potential for catch-up growth, particularly in the sectors of agrotechnology, digital tourism, and renewable energy. In particular, Estonia serves as an example of the successful integration of digital solutions into public administration and tourism systems, contributing to the formation of a sustainable innovation ecosystem.

An analysis of investment dynamics shows that environmentally oriented technologies account for about 30 % of all new startups, with their concentration being higher in countries that maintain strong environmental standards and a well-developed innovation culture. Structural differences among EU regions are closely correlated with GDP per capita, the degree of urbanization, and the contribution of tourism to the economy. While Spain and Germany continue to lead in terms of investment volumes and innovation implementation, Italy and Eastern European countries require improvements in state support mechanisms and the promotion of transnational projects.

It is recommended to deepen the harmonization of financing instruments within the EU, including a fairer distribution of funds from Horizon Europe and InvestEU, as well as to strengthen cross-border collaborations among universities, businesses, and public institutions. Particular importance is attached to the development of networks of «green incubators» and open innovation platforms capable of reducing regional disparities and enhancing the competitiveness of small and medium-sized enterprises.

The prospects for the further development of the European startup ecosystem are closely linked to deeper digitalization, the integration of artificial intelligence and big data technologies, as well as the expansion of sustainable tourism practices and «green» entrepreneurship as key drivers for building a «smart economy». In the context of global transformations and the transition toward a climate-neutral growth model, startups are becoming a vital element of the innovation infrastructure, contributing to the creation of high-tech jobs, regional development, and enhanced competitiveness of small and medium-sized enterprises.

By 2030, a new model of entrepreneurship is expected to emerge, based on the principles of digital inclusivity, sustainable consumption, and cross-sectoral innovation integration. This model will be characterized by close cooperation among research centers, technology incubators, and EU investment funds, as well as the active participation of startups in implementing the European Green Deal and the Digital Decade 2030 strategies.

Future research should focus on quantitatively assessing the contribution of startups to employment, regional development, economic decarbonization, and the adoption of circular business models. This will help develop more precise and adaptive strategic innovation management tools within the European Union, enhance the effectiveness of government support for entrepreneurship, and accelerate the transition to a knowledge-based economy where sustainability and innovation become the main sources of long-term growth.

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DARK KITCHEN: AN INNOVATIVE SOLUTION IN THE RESTAURANT BUSINESS

As a result of global changes in approaches to distribution management and improving the economic efficiency of enterprises, the active implementation of digital technologies and new formats of interaction with consumers is becoming increasingly common. One of the relatively new phenomena for the restaurant business is the Dark Kitchen format – a model for selling culinary products without a traditional dining area. The use of this concept can be an effective tool for increasing profitability [1].

Dark Kitchen, or "ghost kitchen" / "cloud kitchen", is a type of establishment where food is prepared exclusively for delivery. The only contact link between the customer and the restaurant is the couriers. Such kitchens lack visitor halls, takeaway options, interior, or waitstaff – everything is aimed at minimizing direct interaction with customers.

The main audience for such services is people who want to eat quickly and conveniently without spending time and effort on cooking. It is the speed and quality of delivery that become the key success factors of the Dark Kitchen business model,