

2019 | 2020 HOTREC ANNUAL REPORT



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VISION

Hospitality is central to developing European tourism, fostering growth, jobs and innovation and unlocking its potential.

MISSION

HOTREC is the umbrella association of Hotels, Restaurants, Bars and Cafés and similar establishments in Europe, which brings together 45 National Associations in 33 countries, and is the voice of the hospitality industry in Europe. HOTREC's mission is to:

- Represent and champion its interests towards the EU and international institutions, as well as to all kinds of relevant stakeholders;
- Foster knowledge sharing and best practices among its Members to further promote innovation;
- Act as a platform of expertise for the European hospitality industry.



Visit our website: www.hotrec.eu

FOREWORD BY MR ZURAB POLOLIKASHVILI, SECRETARY GENERAL OF THE U.N. WORLD TOURISM ORGANISATION



I thank HOTREC for its longstanding commitment to monitoring European hospitality and providing key insights that will undoubtedly inform the important decisions that will have to be made in the wake of this crisis

As global tourism enjoyed consistent growth for almost a decade following the economic downturn of 2008, Europe was an example for the rest of the world to follow. The tourist accommodation and hospitality sectors led the way in creating jobs and opportunities and driving social development and economic growth.

The COVID-19 pandemic brought this strong and consistent growth to an abrupt standstill. However, in the greatest challenge the global community has faced for a generation, the same sectors have once again led by example. Across Europe, tourism and hospitality have come together to put people first. Hotels have made their rooms and services available to frontline health workers while hospitality establishments have taken action to help the most vulnerable members of society.

Europe will need a strong and vibrant tourism sector to grow back from adversity. Cooperation will be more important than ever. This means we will need strong political leadership and firm commitments to help tourism businesses –including tax breaks, reforms to regulation and fiscal policies and steps to maintain jobs. Organisations like HOTREC will also play an essential role in leading recovery by creating opportunities and embracing innovation.

Clear and impartial data – on what the sector has achieved, where we are going and where we can improve – will also be vital. For this reason, on behalf of the World Tourism Organization (UNWTO), I thank HOTREC for its longstanding commitment to monitoring European hospitality and providing key insights that will undoubtedly inform the important decisions that will have to be made in the wake of this crisis.

I am confident that this publication will be of use to all HOTREC members as well as for businesses of all sizes across the whole of Europe's tourism value chain. And I offer my assurances that UNWTO will continue to work closely with the sector, offering our expertise and practical support in any way we can.

6 May 2020

FOREWORD BY MR THIERRY BRETON, EUROPEAN COMMISSIONER FOR INTERNAL MARKET



I trust the success of a recovery plan and I give my full support to the hospitality sector to help save hotels, restaurants and cafés around Europe

Beyond the health emergency, we are experiencing an economic shock on a scale that has not been seen since 1929. I say this clearly – because we must be completely realistic about what lies ahead: the crisis is and will be very serious.

The first European response has been rapid and strong, with the injection of liquidity by the ECB, the flexible application of the Stability Pact, measures to facilitate State aid, the increase in the EIB's liquidity support for SMEs and the solidarity instrument to help workers keep their incomes and help businesses stay afloat (SURE).

In response to immediate needs, we are working to provide a safety net for the entire sector.

Ensuring liquidity is the first priority. But funding must also be provided quickly to bridge this period until tourism flows resume.

However, we will have to go further, with a European industrial recovery plan for all European industrial ecosystems, the famous fourth pillar of the last Eurogroup – a Marshall Plan. According to our estimates, tourism should be the main beneficiary of such a plan. It is therefore essential for it to be implemented quickly.

In order to overcome the crisis, tourism needs to be reinvented. I see three components of such a strategy.

Firstly, tourism must be at the heart of the European Green Deal and promote sustainable tourism in the face of the "over-tourism" that can be observed in certain cities or regions.

Secondly, tourism will have to go digital and find a balance between the so-called traditional players and the major digital platforms.

Finally, tourism must become strategic: because of its economic and social weight, and because it is based on a rich European history and priceless European cultural diversity, it must also protect itself.

I trust the success of a recovery plan and I give my full support to the hospitality sector to help save hotels, restaurants and cafés around Europe.

25 May 2020

MESSAGE FROM HOTREC PRESIDENT



We are in a crisis. But there is always hope. We are characterized by our capacity to innovate, seize opportunities and always accommodate our guests.

Just a few months ago, across all hotel categories and restaurants, our industry was experiencing unprecedented and positive growth estimates. We were expecting to continue our trajectory of growth, job creation and increasing daily rates. We were basing our business strategies on sound and promising estimates. Plans to expand, renovate, refurbish and 'go green' were underway to make the increase in global tourism go hand-in-hand with sustainability.

Today, only months after the COVID-19 pandemic has swept across the world, our industry is facing the worst crisis in its history. We as an industry were not only the first to be hit but we are also being hit the hardest. Almost overnight, bookings in our hotels and restaurants were cancelled and within weeks many businesses were forced to close down by governments to contain the virus. Our sources of income are gone and, without any prospect of normalization, the uncertainty is forcing our members to let go of highly-valued employees. SMEs and micro-enterprises in particular are suffering the most. For many, there will not even be a business to return to once this crisis is over.

No one could have foreseen the current situation. In 2019, the majority of countries had experienced an increase in their RevPAR (revenue per available room) close to or above 5% driven by an overall increase in occupancy rates. Our prospects were promising and cemented the fact that we, in hospitality, have been an industry of growth and innovation since the financial crisis of 2008. COVID-19 is forcing us to face a new reality. A reality where the growth forecasts have turned into a deep recession.

The times to come will be characterized by uncertainty. All we can do is adapt to the situation the best we can. We do not know when the different measures enacted to fight the virus such as social distancing, stronger hygienic and cleaning requirements, forced closures etc. will come to an end and when borders will reopen. However, what we do know is that now, more than ever, is the time to stand together and find common ground on how to reopen our economies. How we, in HOTREC, best gain influence on the political decisions that are to be made in the months to come, will be crucial. No one will gain anything from unilaterally opening borders prematurely. We and our economies are too intertwined and too dependent on one another. The crisis requires coordination – not only within the EU but increasingly on a global level as well.

Nevertheless, even when the bans on our businesses are lifted, and even when customers return, they will only do so gradually, and it will take time before we get back to business as usual. The IATA (International Air Transport Association) has forecast that world air traffic, which is so vital to our businesses, will only reach 50% of its former activity by the end of the fourth quarter of 2020. We also know that for some businesses it took up to 5 years to fully recover from the financial crisis in 2008. These are sad but realistic prospects.

MESSAGE FROM HOTREC PRESIDENT



There is no need to stress anything but the truth: we are in a crisis. But there is always hope. After the financial crisis, we were one of the first industries to recover. We are characterized by our capacity to innovate, seize opportunities and always accommodate our guests. Our task will be to get back to the starting point of 2019. This will be no easy task. We will have to uphold an extraordinary level of hygiene, provide hand-sanitizer, spread out customers over larger areas, and find new ways of serving food and beverages etc. for months to come. Nonetheless, if these are the initiatives necessary for us to reopen, we will find ways to honour them.

Over the last couple of months, HOTREC has worked very hard on gathering and distributing experiences, and measures made and enacted by the many different governments in the EU towards our industry. This is very helpful information for all of us. Thank you to all organizations which have contributed to this. May it continue so that we can inspire and help each other in overcoming this terrible crisis we are all in. And let's remember, that we are in it together and that we will overcome it together.

It is however, and fortunately, not all bad news. I have the pleasure of announcing that come August, Marie Audren will accede as the new HOTREC Director General. We are very much looking forward to the coming collaboration and have high expectations.

I would like to express my gratitude, and thanks to all partners, HOTREC members, ExCom and last but certainly not least, the HOTREC team. You have worked very hard and unstintingly during the process of finding our new Director General.

It will in so many ways be a new reality waiting for us all on the other side of COVID-19. A reality that we must make work for all of us. Let us face this new normal together.

8 May 2020

The economic data used in this message was provided by [MKG Group](#).

FROM THOMAS COOK COLLAPSE TO THE CORONAVIRUS CRISIS – TOURISM SHAKEN TO ITS FOUNDATIONS

Autumn 2019 and the first half of 2020 were marked by two powerful events that hit the hospitality sector extremely hard, shaking the very foundation of what made its success: trust in safe travelling in Europe.

Following the collapse of Thomas Cook, tens of thousands of hotel bookings were cancelled across Europe, many hotels were left with unpaid bills for up to three months, and the biggest repatriation operation since World War II had to be organised for tourists stranded abroad. A study from the Greek [Hellenic Chamber of Hotels](#) (HCH) showed a potentially negative impact for Greek hotels of €1 billion, while in other large touristic countries several hundred millions of euros of losses were reported.

This difficult situation was made worse with the spread of the COVID-19 pandemic. With borders closed and strict travel restrictions, hotels experienced single-digit occupancy rates (when open) and a drop in revenue of up to 90%, while restaurants and bars were forced to close completely. Despite emergency support packages by governments, a high share of hospitality businesses legitimately fear that they will not survive the COVID-19 crisis as a result of liquidity shortages (e.g. it is estimated that in Italy the tourism sector will at least have lost €60 billion worth of revenues). A recent study by the World Travel and Tourism Council (WTTC) showed that in Europe 10 million jobs are at risk in the travel and tourism sector. This is massive, especially for a sector which was one of the most dynamic job creators in Europe over the past 10 years.

Hotrec
Hospitality Europe

COVID-19 situation overview for hospitality sector

Feedback from HOTREC Members shows that the COVID-19 crisis is severely hitting the hospitality sector. In most EU countries, restaurants and bars were closed to the public and the hotels that remained open show very low occupancy rates.

Economic relief measures

EU Member States are introducing various support schemes to prevent bankruptcies in the industry and contain rising unemployment figures. Latest good practices by EU Member States include measures for:

- **Rental relief** – e.g. government subsidises rental payments or prohibits lease terminations;
- **Compensation of loss of turnover** – e.g. governments make available funds to address lack of liquidity and/or make interest-free loans available to small companies;
- **Wage subsidies** – e.g. government subsidises wages in sectors heavily hit by COVID-19 crisis or provides income support for laid-off workers;
- **Loan guarantees** – government guarantees loan repayments for a given period of time or introduces a moratorium;
- **Tax or social contribution relief** – e.g. government lifts payments of certain social contributions or postpones deadlines for payment of direct or indirect taxes.

Fighting for a successful, sustainable and job-rich recovery

As the COVID-19 crisis is here to stay until the end of 2020, the EU, Member State governments and the sector must now start working together on a plan that will lay the foundations for a new prosperous, sustainable and innovative hospitality and tourism sector. Until the end of 2019, the hospitality sector was extremely successful, with more than 2 million jobs created between 2013 and 2017. At the end of the year, all hotel categories registered a positive Revenue per Available Room (RevPAR) growth (e.g. +3.3% for three stars; +3.0% for four stars and +1.6% for five stars). Now the strength lies in the industry itself to overcome this crisis and return to new heights through massive financial support for a restart, a coordinated approach to the reopening of borders and the return of customers' confidence in safe travel. In the world after the COVID-19 outbreak, hospitality will more than ever need to provide great experiences and memories to millions of travellers.

CORE POLICY ACHIEVEMENTS AND ACTIVITIES



HOTREC constantly strives to develop actions that achieve meaningful results to the benefit of the hospitality industry in Europe – and, on a broader scale, to society. In 2019/2020, HOTREC developed several activities contributing to that goal through fruitful cooperation with the EU institutions and policy-makers.



HOTREC actively promoted measures to be taken by the European Commission to help the sector fight the consequences of COVID-19 and build an exit plan.

HOTREC's response to COVID-19

COVID-19 created challenging times for the hospitality sector. With airlines' capacity down to 10%, the borders of most EU countries closed and people staying at home, most companies in the hospitality sector were asked to suspend their services as from mid-March 2020 or chose to close their businesses due to lack of clients. Taking the situation into account, HOTREC developed several actions to help the industry recover.

Advocacy on all fronts

Since February 2020, HOTREC has held meetings with the European Commission (including Commissioner Thierry Breton), UNWTO, WTO and other tourism stakeholders to provide information on the state of play of the sector and propose possible ways forward.

The European Commission deployed State Aid and proposed a [European instrument for temporary Support to mitigate Unemployment Risks in an Emergency \(SURE\)](#) (up to €100 billion) to fight the liquidity problems faced by companies. We supported a coordinated approach at EU level to open up Members States' borders and state-guaranteed voucher schemes to address cancellations in the tourism sector. We also asked to postpone the application of burdensome legislation (e.g. delaying the implementation of the Strong Customer Authentication scheme for remote card payments for at least one year).

The Commission listened carefully to all of HOTREC's solicitations and proposed, in mid-May, a [package of measures](#) to reboot the European tourism sector through a coordinated approach. Different stakeholder coalitions were deployed and dialogues initiated to help the sector bounce back (e.g. with foodservice providers, social partners, alcohol producers, Booking.com, TripAdvisor, etc.). Moreover, the HOTREC team regularly collected best practices so that Member Associations could learn from each other.

The way forward

HOTREC will continue its direct dialogue with the EU institutions to help the sector recover. We expect to see further solutions develop via the launch of the new EU digital policy and the EU Green Deal, with, amongst others, specific EU funding to support companies.

HOTREC published its White Paper for the new EU mandate with 5 key priorities

Following the 2019 European elections and the nomination of a new European Commission led by President Ursula von der Leyen, HOTREC published a [White Paper for Hospitality in Europe](#), which proposes a new impetus for EU policies impacting tourism.

5 key priorities to support a successful, innovative and sustainable tourism sector

Building on recent achievements for the hospitality sector, HOTREC's White Paper for Hospitality in Europe proposes 5 key policy priorities for the EU mandate 2019-2024:

- **'Collaborative' economy:** a level-playing field should be implemented between professionalised short-term rental activities and regulated hospitality services;
- **A Better Regulation agenda** with new thinking on subsidiarity is needed. EU legislative action should focus on large cross-border issues, better assess the sectoral impact of horizontal legislation and mitigate impacts on businesses operating only locally;
- **Digital:** the outdated EU regulatory framework on the liability of platforms should be revised to recognise their increasing impact on the economy and society;
- **Food policy:** voluntary initiatives on healthy nutrition for local food services should be fostered instead of horizontal EU legislation;
- **Social Affairs:** the fight against skill shortages should be genuinely addressed by the EU, with strong actions to help businesses attract, train and retain the workforce.



SHORT-TERM RENTALS

Implement the actions taken by the European Commission in 2018 to support responsible and sustainable tourism and go further



BETTER REGULATION

New thinking on subsidiarity and exerting EU competences is needed



DIGITAL

Revise the EU regulatory framework to recognise the liability of platforms and ensure a fairer and more balanced digital single market



FOOD POLICY

Foster voluntary initiatives on diet and nutrition for local food services instead of horizontal EU legislation



SOCIAL AFFAIRS – SKILLS

Make the fight against skill shortages a genuine EU case

2019-2024 EU MANDATE

WHITE PAPER FOR HOSPITALITY IN EUROPE

TOWARDS SUSTAINABLE TOURISM IN EUROPE



Following the 2019 European elections and the nomination of a new European Commission led by President Ursula von der Leyen, HOTREC published a White Paper for Hospitality in Europe, which proposes a new impetus for EU policies impacting tourism

Keeping unfair practices by platforms in check

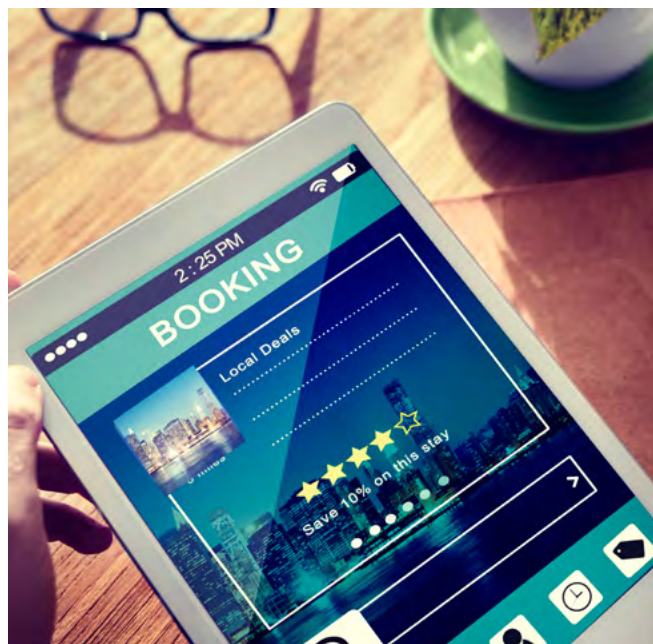
Throughout 2019 and 2020, HOTREC was again at hand to support work towards a more balanced online market for consumers and the hospitality sector by drawing the EU Institutions' attention towards some of the most damaging practices undertaken by major online platforms.

Booking.com commits to improving information to consumers

Shortly before Christmas 2019, the European Commission announced an agreement with Booking.com to end manipulative techniques pressuring consumers when booking hotel rooms on its travel site. The ensuing commitments made by Booking.com closely reflected the bad practices consistently highlighted by HOTREC and its Members:

- Making clear to consumers that any statement such as "last room available!" refers to the offer on the platform only;
- Not presenting an offer as being time-limited if the same price will still be available later;
- Clarifying how results are ranked and if payments made by the accommodation provider influenced its ranking position;
- Clarity when a price comparison is based on different circumstances (e.g. stay dates) and not marking it as a discount;
- Ensuring that price comparisons marked as discounts represent genuine savings;
- Clearly and prominently displaying the total price that the consumers will have to pay.

These commitments were offered by Booking.com in the light of scrutiny of its business practices by the European Commission and National Consumer Authorities. European Commissioner for Justice, Mr Didier Reynders, emphasized that online travel platforms would continue to be monitored for any unfair practices to safeguard consumers. Booking.com assured it will comply with the changes by 16 June 2020.



Successfully challenging unilateral cancellation policies

Amidst the COVID-19 crisis, major online intermediation platforms suddenly and unilaterally modified their cancellation and virtual credit card payment policies. Citing 'force majeure', platforms such as Booking.com offered users full refunds for reservations which had been marked as non-refundable – leaving an even greater and unexpected shortage of liquidity for hotels.

HOTREC rapidly contacted platform representatives to explain why this practice was extremely damaging and distressful for hoteliers and called for solidarity across the value chain, strongly criticising the lack of support shown towards hotel partners.

After applying the unwelcome cancellation policy for a fortnight, Booking.com adapted its approach and put an end to its 'force majeure' cancellation policy on 6 April 2020. As requested by HOTREC, the change of policy was rapidly implemented across Europe and communicated to hotel partners.

The ensuing dialogue also enabled HOTREC to address the possibility for hotels in Europe to offer vouchers for a future stay rather than absorbing a direct cancellation with a full refund.

Fleshing out the Platform to Business Regulation with clear guidelines

The adoption of the Platform to Business Regulation in September 2019 cemented a major step forward for fairer relations between hoteliers and online intermediary platforms. The new rules will render platforms' practices more transparent, predictable and coherent.

Clear guidelines addressing how platforms rank offers on their websites and how they notify changes in their ranking practices to their business partners were nonetheless necessary to complete the picture. HOTREC made a key contribution to the elaboration of such guidelines, underlining the following:

- Online intermediary services should give information about the weighting of all relevant parameters and clarify how parameters act as a 'tie-breaker';
- An 'easily and publicly' available description of platforms' terms and conditions should be clear, concise and easy to access and understand;
- Changes to how ranking parameters function should be communicated to businesses;
- Consumers must be informed about 'paid-for' ranking improvements;
- Sector-specific guidelines for online travel platforms are important;
- Information should be available in national languages;
- Specific attention must be awarded to search functions on supports which wield a limited number of search results, like voice or mobile;
- Vertical concentration of platforms – notably ownership of both meta-search and OTA sites – must be carefully considered.

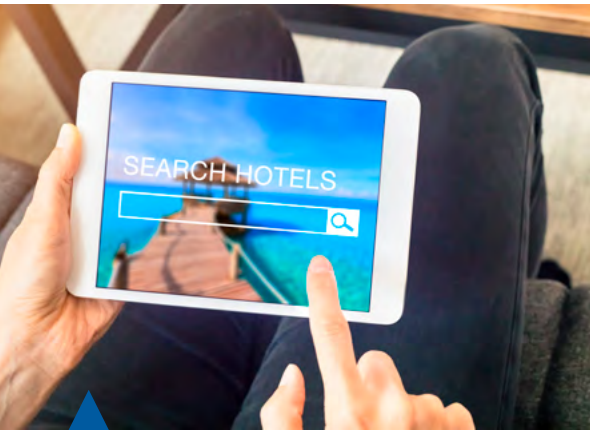
The ranking transparency guidelines will form an essential tool to implement the new EU rules as from July 2020.



Dialogue enabled HOTREC to address the possibility for hotels in Europe to offer vouchers for a future stay rather than absorb a direct cancellation with a full refund.



Changes to how ranking parameters function should be clearly communicated to businesses.



The extent to which platforms are responsible and liable for unlawful and harmful content is now clearly on the EU policy agenda with the upcoming Digital Services Act.



HOTREC proposed solutions to overcome the skills gap in the hospitality sector.

Towards stricter rules for online platforms?

Despite advances towards more responsible, fair and transparent behaviour from platforms over the past few years, abuses remain frequent, unpredictable and damaging, and the issue of online platforms' market dominance remains unaddressed by EU legislation. The 'new' European Commission which took office in October 2019 has shown a willingness to square the circle, announcing the launch of an ambitious Digital Services Act in 2021.

The extent to which platforms are responsible and liable for unlawful and harmful content is now clearly on the EU policy agenda with the upcoming Digital Services Act, which will review the limited liability regime that platforms have profited from for over two decades. The EU executive will also examine how market dominance in the online sphere is playing out and address key imbalances, with the online travel market clearly in its line of sight. A review of EU Competition rules could also delve into the imposition of narrow parity clauses by online travel platforms on hoteliers in Europe.

HOTREC can look forward to these key policy initiatives, with a major opportunity to solve issues with important platforms that the association has been raising awareness about for the best part of a decade.

Helping to build a new Skills Agenda for the EU

On January 2020, HOTREC issued its position paper on "[How to attract and retain the workforce in the hospitality sector](#)". Challenges were highlighted, namely skill shortages in the sector (e.g. digital, interpersonal and linguistic skills, cooking abilities, etc.), low-profit margin of companies and consequent difficulties in paying for training and the non-stop opening hours of the sector (including bank holidays and weekends).

As part of the solution, HOTREC advocated that the image of the sector should be improved; apprenticeship schemes implemented at national level; direct contact with training providers deployed; conditions for the employees to build a career in the sector created; the hospitality skills passport applied at national level; EU funding made easily accessible to companies. These solutions were put forward during the Commission's consultation on the New Skills Agenda for Europe. HOTREC trusts that the Commission's upcoming proposal on the matter will include HOTREC's proposed solutions.

HOTREC co-drafts the EU recommendations for action on food waste reduction in the foodservice sector

The hospitality industry is firmly engaged to minimise food waste. Over the past years, [HOTREC and its members issued various guidances to businesses](#), while HOTREC became an active member of the EU platform on food loss and food waste. Within this framework, HOTREC was appointed rapporteur to draft recommendations on food waste prevention in the foodservice sector.

Supporting small businesses and responding to consumer expectations

Leading the work, in cooperation with the European Commission, EU stakeholders and the rapporteurs for other parts of the food chain, HOTREC elaborated concrete recommendations addressed to both public and private entities to support food waste prevention efforts in foodservice businesses. [The recommendations were adopted by the EU Platform on food waste](#) on 12 December 2019. They largely focus on the necessary technical and financial support to small businesses, on the need to influence consumer expectations and behaviour to prevent plate waste, and identifying solutions for food donations. Through its engagement, HOTREC delivered concrete solutions for policy-makers, stakeholders and businesses to step up the fight against food waste and reduce operating costs.

A workable timeframe to implement a new standard for online payments

As per the revised Payment Services Directive, all merchants had to implement a new authentication standard for online payments called Strong Customer Authentication (SCA) by 14 September 2019.

SCA raises significant challenges for the tourism sector. Not only do websites need to be changed to capture the required authentication data in direct bookings, but complex solutions also need to be identified to ensure that such data can be passed safely through various intermediaries for bookings made through Online Travel Agents. A lack of technical readiness meant that the sector was at risk of seeing massive transaction declines and losses.

A first delay obtained until end 2020

To avoid such a dramatic scenario, HOTREC teamed up with organisations from the payment, retail and tourism sectors to jointly advocate for a postponement of the implementation date. This approach convinced the European Banking Authority and the European Commission to delay enforcement of SCA until the end of 2020. However, given the impact of the COVID-19 crisis that hit Europe in the first half of 2020, HOTREC kept advocating for a further delay that would allow the sector to recover enough to invest in SCA-compliant solutions and offer safe payment environments.



HOTREC delivered concrete solutions for policy-makers, stakeholders and businesses to step up the fight against food waste and generate savings for businesses.



HOTREC advocates for a workable delay which would allow hospitality businesses to become compliant and offer safer payment environments.



CORE EVENTS

Over the past 12 months, HOTREC organised several high-level events aimed at promoting the hospitality industry's benefits to society towards European policy and decision-makers.

HOTREC presents the hospitality sector's key priorities for the 2019-2024 EU mandate in the European Parliament

An event organised in the European Parliament on 12 November 2019 gave HOTREC the opportunity to present its [White Paper for Hospitality in Europe](#) to the newly elected European Parliament, which contains 5 key priorities for the new 2019-2024 EU mandate. The event was hosted by MEP Cláudia Monteiro de Aguiar, Vice-President of SME Europe, and counted Ms Elżbieta Bieńkowska, at the time European Commissioner for Internal Market, Industry, Entrepreneurship and SMEs, MEP Dita Charanzová, Vice-President of the European Parliament, MEP István Ujhelyi, Vice-Chair of the European Parliament TRAN Committee, MEP Carlo Fidanza and Mr Alfred Gajdosik, Vice-President Group III at the European Economic and Social Committee, among its participants. Over one hundred guests participated in the event, including EU officials, officials from the Member States' Permanent representations to the EU, key stakeholders, journalists and HOTREC Members.

During the event, Mr Jens Zimmer Christensen, President of HOTREC, recalled that the hospitality industry is a key-driving force of the European economy, as it employs 11,9 million workers and created 1,6 million new jobs between 2013-2016. He stressed that the 5 priorities of HOTREC's White Paper will help to build a more innovative and sustainable Europe and should therefore be supported by EU policy-makers.

During the event, EU officials and MEPs from various political groups supported HOTREC's messages in favour of a strong EU agenda for a sustainable and competitive tourism sector.



Mr Jens Zimmer Christensen, President of HOTREC, Ms Elżbieta Bieńkowska, former European Commissioner, and MEP Cláudia Monteiro de Aguiar – 12 November 2019, European Parliament.



MEP Dita Charanzová – 12 November 2019, European Parliament



MEP István Ujhelyi – 12 November 2019, European Parliament

The Croatian Presidency of the EU presents its work programme on tourism to HOTREC

On 17 October 2019, the HOTREC General Assembly gave the floor to Mr Frano Matušić, State Secretary of Tourism of Croatia, who presented his government's priorities for the tourism sector at national level, as well as the work programme of the Croatian Presidency of the EU (from 1 January until 30 June 2020) on tourism.

He showcased the Croatian government's plans to diversify the touristic offer (e.g. through rural, gastro and health tourism) and stressed that his government's priority at EU level would be sustainable tourism in Europe, to cut red tape, and encourage job creation and investments in the hospitality and tourism sector. He mentioned that tourism can be an instrument of cooperation and coordination and that stakeholders can help coordinate the activities, the development of the tourism market and the touristic offer.

Debating the future of tourism with the new European Parliament

During its latest General Assembly, held in Dubrovnik on 17 October 2019, HOTREC organised a panel discussion with MEP István Ujhelyi, Vice-Chair of the European Parliament's Transport and Tourism Committee (TRAN), on the future of EU tourism policy under the newly elected European Parliament.

In a vivid discussion with HOTREC members, moderated by Mr András Baneth, Director of the European Office of the Public Affairs Council, MEP István Ujhelyi stressed that his ambition as Vice-Chair of the TRAN Committee was to put tourism at the heart of the EU political agenda. As such, he was devoting much effort to convince the new President of the European Commission, Ms Von der Leyen, to include tourism in the key priorities of the new European Commission's mandate. Furthermore, MEP István Ujhelyi discussed various recent initiatives launched by the European Parliament with his and other MEPs' from various political groups support, such as the European Parliament resolution on the bankruptcy of Thomas Cook or the request for a specific budget line on tourism in the EU's long-term budget to finance tourism-related projects and initiatives at EU level.



Mr Frano Matušić State Secretary of Tourism of Croatia, with Mr Jens Zimmer Christensen, President of HOTREC and Mr Nikola Dobrosravić, President of the Region of Dubrovnik – 17 October 2019, HOTREC General Assembly.



MEP István Ujhelyi, Vice-Chair of the European Parliament's TRAN Committee, debating with Mr András Baneth, Director European office of the Public Affairs Council – 17 October 2019, HOTREC General Assembly.

Debating allergen information in restaurants with EU policy-makers and stakeholders

On 12 December 2019, HOTREC participated in a policy panel discussion organised in the European Parliament about the provision of information to consumers on allergens in food. The event, hosted by MEP Stelios Kypouropoulos and MEP Sylwia Spurek, was organised by the European Federation of Allergy and Airways Diseases' Patients Association on the occasion of the launch of their report "Quality of Life for People with Food Allergies in Europe: A Menu for Improvement". Various EU officials, Member States' officials and stakeholders participated to discuss how to provide safe eating environments for people suffering from allergies.

HOTREC explained that restaurants are a specific environment, mostly composed of micro-enterprises using fresh ingredients to prepare non-standardised meals, with regular changes in menus and supplies. These specific challenges justify the flexibility offered by the Food Information to Consumers Regulation to Member States to allow oral information on allergens in restaurants. A simple discussion is the most efficient way to inform customers about the safety of their meal and ensure that information provided is always up-to-date. The event was a great opportunity to explain restaurants' specificities and to dialogue with both NGOs representing people suffering from allergies and EU policy-makers.

Horeca sector social partners renew statement on the platform economy and launch risk assessment tool

On the occasion of the Sectoral Social Dialogue plenary meeting on 29 November 2019 in Brussels, HOTREC and its trade union counterpart EFFAT (the European Federation of Food, Agriculture and Tourism Trade Unions) renewed their [Joint Statement on the Platform Economy](#) and called for a level playing field and fair competition in the hospitality sector to be deployed.

On the same occasion, an [OIRA tool](#) (online risk assessment tool) for the hospitality sector was launched under the umbrella of [OSHA](#). The objective is that companies at national level can adapt the tool built at EU level, to make sure that they all comply with health and safety legislation. The advantages of the tool are clear: safety and security at the workplace will be improved, while potential hazards and injuries will be reduced. This was an excellent opportunity for social partners to make their voice heard and to exchange best practices with their members.



Mr Jean-Marc Banquet d'Orx, Chair of HOTREC Sectoral Social Dialogue, and Mr Kristjan Bragason, EFFAT Secretary General, on 29 November 2019 in Brussels.

Solutions to attract and retain the workforce in the hospitality sector

On 25 September 2019 HOTREC organised a workshop in Brussels on “How to attract and retain the workforce in the hospitality sector”. The workshop counted Ms Julie Fionda (DG EMPL), Mr Maxime Cerutti (Business Europe), Ms Kerstin Howald (EFFAT), Mr Jochen Leopold (HotelCareer) and several HOTREC members among its participants. Discussions included an overview of the Commission’s roadmap to overview skills shortage; challenges and opportunities to build a career in the hospitality sector; ideas on how to attract and retain the workforce in the sector. Success stories were also shared by HOTREC members. As a result, HOTREC drafted its position paper on “How to attract and retain the workforce in the hospitality sector”.

The latter was welcomed by the European Commission. HOTREC believes that the new Skills Agenda for Europe will take HOTREC’s input into account.

HOTREC discusses coastal tourism and sustainability with Croatian Presidency of the EU

On 4 March 2020, HOTREC organised a Joint Working Group on Coastal Tourism and Sustainability with its members. The event gave the floor to Ms Ana Štrbac, Counsellor for Tourism at the Croatian Permanent Representation to the EU, who recognised the importance of tourism for the EU economy. She announced that the Croatian Presidency will work on the EU Green Deal and on a plan to dynamize energy in the islands. The latter will focus on desalinization, wind power, safety, increase in jobs and investment in a sustainable future.

As a result of the meeting, the Croatian Presidency will include support to coastal tourism in the conclusions of its presidency, taking stock of the challenges (seasonality; sustainability, slack of kills; accessibility) and the many opportunities (development of networks; promotion of quality of the offer; spread the touristic demand all year long; ensure strategies to promote accessibility to all destinations; promotion of sustainable tourism). During the meeting, HOTREC members concluded that tourism produces a very low percentage of emissions of greenhouse gases when compared to other industries (e.g. oil and gas; traffic and aviation; fisheries, etc.).



Jean-Marc Banquet d’Orx, Chair of the HOTREC Sectoral Social Dialogue; Jens Zimmer Christen, HOTREC President and Jochen Leopold, Team Manager HotelCareer at the HOTREC workshop on skills, on 25 September 2019.



Mr Jens Zimmer Christensen, President of HOTREC; Mr Marc Van Mulders, Vice-President of HOTREC, Antonio Flamini, Chair of the Coastal Tourism Working Group; Marta Machado, HOTREC Public Affairs Manager; Ms Ana Štrbac, Tourism Counsellor at the Croatian Permanent Representation to the EU; Mr Marc Seychell (MHRA/Malta); Mr Ramón Estalella (CEHAT/Spain); Mr Ole Michael Bjondal (NHO/Norway) at the Joint Coastal and Sustainable Tourism working group on 4 March 2020.

CEPS ask Force on the ‘Collaborative Economy’

“The regulatory framework for the collaborative economy has not worked from a Digital Single Market perspective. How can we find a single market baseline for the collaborative economy?”

The Centre for European Policy Studies (CEPS), a leading independent EU think tank, convened a wide range of stakeholders, EU officials and academics around this key policy question for regulating the so-called collaborative or ‘shadow’ economy in the areas of tourist accommodation and local transportation.

The discussions focused on adapting the EU E-commerce Directive of 2000 to the online market reality of today under the upcoming Digital Services Act. It emerged that there is a genuine consensus about strengthening the regulatory framework for shadow economy services and entrusting online platforms with a higher degree of responsibility for the content they circulate and services they make available.

HOTREC actively took part in the discussion, highlighting the need to set out a predictable and consistent framework at EU level for appropriate registration, taxation and oversight procedures at local level to ensure operators of short-term rentals compete on an equal basis against hotels.

Dialogue with VISA on the new Strong Customer Authentication standard for payments and its impact on hotels

HOTREC invited Ms Caroline Drolet, European Head of Card on File Payments at VISA, to discuss the impact of the new Strong Customer Authentication (SCA) standard for payments on the hospitality sector at its latest General Assembly. Strong Customer Authentication is a new standard which became mandatory in September 2019 and introduces a new layer of authentication in payment transactions to reduce the risk of fraud.

Ms Drolet explained that this new standard raises many implementation issues in the hotel sector for electronic transactions. She highlighted that SCA compliance for guaranteed bookings and incremental changes after check-in when the cardholder is not present (e.g. express check-out, delayed charges, etc.) will be a huge challenge, especially when the bookings were made through Online Travel Agents (OTA). There is a risk of massive transaction declines in the hotel sector. She explained in detail the steps to be taken by hotels and the remaining challenges to make the system work while recalling that the industry has been given until the end of 2020 to comply by the European Banking Authority.



Ms Caroline Drolet, European Head of Card on File Payments at VISA, explaining the impact of SCA on hotel payments - 17 October 2019, HOTREC General Assembly.

Tourism in transition - seminar organised by the Maltese Permanent Representation

On 27 June 2019, HOTREC President, Jens Zimmer Christensen, participated in the seminar organized by the Maltese Permanent Representation on "Tourism in transition". The seminar also involved Ambassador Lorenzo Vella, Maltese Permanent Representation, and Ms Anna Athanasopoulou, Head of Unit at DG GROW, European Commission.

During the event, challenges and opportunities for the tourism sector were discussed, namely sustainability, management of flows, climate change, digital technology, investment, and access to finance. HOTREC defended measures for European tourism to remain sustainable: promotion of energy efficiency and the reduction of food waste; control over disruptions caused by overtourism in some destinations; implementation of a competitive VAT policy at EU and national level; encouragement of digital transformation. The latter could be achieved by ensuring fair competition vis-à-vis the big players and a level playing field amongst similar players.

In this context, subsidiarity and proportionality must prevail; the sectoral impact (e.g. on tourism businesses) of horizontal legislation should be better taken into consideration and derogations be granted whenever a negative impact on local businesses is identified. All in all, it was an opportunity for HOTREC to express its ideas and make its voice heard.



Mr Tim Fairhurst, ETOA Secretary-General, Mr Jens Zimmer Christensen, HOTREC President, and Mr Emmanuel Mounier, EuTravelTech Secretary-General, amongst others, attending the seminar organised by the Maltese Permanent Representation on 27 June 2019.

MEET THE TEAM AND THE EXECUTIVE COMMITTEE

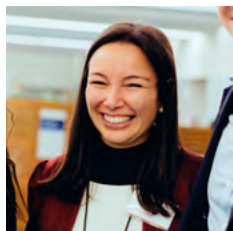
THE TEAM



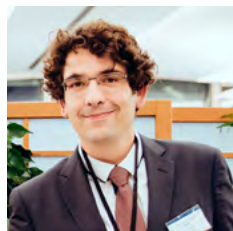
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President – Denmark



Marc Van Muylders
Vice-President – Belgium



Adrian Cummins
Treasurer – Ireland



Ramón Estalella
Member – Spain



Laurent Duc
Member – France



Markus Luthé
Member – Germany



Julian Bystrzanowski
Member – Poland



Antonio Flamini
Member – Italy



Václav Stárek
Member – Czech Republic



Morten Thorvaldsen
Member – Norway



Alexandros Vassilikos
Member – Greece

ACCESS HOTREC'S MEMBERSHIP



FULL MEMBERS

AUSTRIA

APHA-Fachverband Hotellerie

www.hotelverband.at

President: Susanne Kraus-Winkler

CEO: Maria Schreiner

APRA-Fachverband Gastronomie

www.gastronomieverband.at

President: Mario Pulker

CEO: Dr. Thomas Wolf

BELGIUM

Fed. Ho.Re.Ca. Bruxelles-Brussel

www.horecabruxelles.be

President: Philippe Trine

HORECA Vlaanderen

www.horecavlaanderen.be

President: Filip Vanheusden

CEO: Matthias De Caluwe

Fédération HoReCa Wallonie

www.horecawallonie.be

President: Thierry Neyens

Secretary General: Pierre Poriau

BULGARIA

BHRA-Bulgarian Hotel and Restaurant Association

www.bhra-bg.org/en

Chairmen of the Board of Directors:

Veni Petrova; George Shterev; Rumen Kalaydjiev

CROATIA

UPUHH-Association of Employers in Croatian Hospitality

www.upuhh.hr

President: Veljko Ostojić

Vice-President: Ivan Sabljčić

Director/CEO: Bernard Zenzerović

CZECH REPUBLIC

AHR CR-The Czech Association of Hotels and Restaurants

www.ahrcr.cz

President: Ing. Václav Stárek

General Secretary: Ing. Klára Stárek Zachariášová

DENMARK

HORESTA-Association of the Hotel, Restaurant and Tourism Industry in Denmark

www.horesta.dk

President: Jens Zimmer Christensen

CEO: Katia K. Østergaard

ESTONIA

EHRA-Estonian Hotel and Restaurant Association

www.ehrl.ee

President: Ain Käpp

General Manager: Maarika Liivamägi

FINLAND

MaRa-Finnish Hospitality Association

www.mara.fi

President: Tomi Lantto

General Manager: Timo Lappi

FRANCE

GNC-Groupement National des Chaînes

www.gnc-hotels.com

President: Jean-Virgile Crance

GNI-Groupement National des Indépendants Hôtellerie et Restauration

www.gni-hcr.fr

President: Didier Chenet

UMIH-Union des Métiers et des Industries de l'Hôtellerie

www.umih.fr

President: Roland Heguy

Director General: Philippe Delterme

GERMANY

DEHOGA-Deutscher Hotel- und Gaststättenverband

www.dehoga.de

President: Guido Zöllick

CEO: Ingrid Hartges

IHA-Hotelverband Deutschland

www.hotellerie.de

President: Otto Lindner

CEO: Markus Luthe

GREECE

HCH-Hellenic Chamber of Hotels

www.grhotels.gr

President: Alexandros Vassilikos

CEO: Dr. Agni Christidou

HUNGARY

HHRA-Hungarian Hotel and Restaurant Association

www.hah.hu/en

President: Tamás Flesch

Secretary General: Zsófia Sárvári-Deák

IRELAND

IHF-Irish Hotels Federation

www.ihf.ie

President: Elaina Fitzgerald Kane

Chief Executive: Tim Fenn

RAI-Restaurants Association of Ireland

www.rai.ie

President: Mark McGowan

Chief Executive: Adrian Cummins

ITALY

FEDERALBERGHI-Federazione delle Associazioni Italiane Alberghi e Turismo

www.federalberghi.it

President: Bernabò Bocca

Director General: Alessandro Massimo Nucara

FIPE-Federazione Italiana Pubblici Esercizi

www.fipe.it

President: Dott. Lino Enrico Stoppani

Director General: Roberto Calugi

LATVIA

AHRL-Association of Latvian Hotels and Restaurants

www.hotels-restaurants.lv

President: Janis Valodze

Acting President: Janis Pinnis

CEO: Mag. Santa Graikste

LITHUANIA

LVRA-Lithuanian Hotel and Restaurant Association

www.lvra.lt

President: Evalda Šiškauskienė

Managing Director: Egle Lizaityte

LUXEMBOURG

HORESCA-Fédération Nationale des Hôteliers, Restaurateurs et Cafetiers du Grand-Duché de Luxembourg

www.horesca.lu

President: Alain Rix

Secretary General: François Koepp

MALTA

MHRA-Malta Hotels and Restaurants Association

www.mhra.org.mt

President: Tony Zahra

CEO: Andrew Agius Muscat

NETHERLANDS

KHN-Dutch Hotel, Restaurant and Café Association

www.khn.nl

Chairman of the Board: Robèr Willemsen

CEO: Dirk Beljaarts

POLAND

IGHP-Chamber of Commerce of the Polish Hotel Industry

www.ighp.pl

President: Ireneusz Węglowski

Secretary General: Marcin Mączyrński

ZPHoReCa-Association of Employers HoReCa

<http://www.zphoreca.pl>

President & CEO: Marcin Zawadzki

SLOVAKIA

AHRS-The Slovak Association of Hotels and Restaurants

www.ahrs.sk

President: Tomáš Ondrčka

Secretary General: Marek Harbulák

SLOVENIA

TGZS-Tourism and Hospitality Chamber of Slovenia

www.tgzs.si

President: Andrej Prebil;
Director: Fedja Pobegajlo

SPAIN

CEHAT-Confederación Española de Hoteles y Alojamientos Turísticos

www.cehat.com

President: Jorge Marichal; Secretary General: Ramón Estalella

CEHE-Hostelería de España

www.cehe.es

President: José Luis Yzuel Sanz
Secretary General: Emilio Gallego Zuazo

SWEDEN

VISITA-Swedish Hospitality Industry

www.visita.se

President: Maud Olofsson; CEO: Jonas Siljhammar

ASSOCIATE MEMBERS

ICELAND

SAF-Icelandic Travel Industry Association

www.saf.is/en

President: Bjarnheiður Hallsdóttir; CEO: Jóhannes Þór Skúlason

LIECHTENSTEIN

LHGV-Liechtensteiner Hotel & Gastronomieverband

www.lhgv.li

CEO: Walter Hagen

NORWAY

NHO Reiseliv-Norwegian Hospitality Association

www.nhoreiseliv.no

President: Ole Warberg; CEO: Kristin Krohn Devold

OBSERVERS

AZERBAIJAN

AHA-Azerbaijan Hotel Association

www.hotelassociation.az

President: Martin Kleinmann
Secretary General: Gunay Saglam

GEORGIA

HOREKA-Georgian Hotel Restaurant Café Federation

www.horeka.ge

President: Ketevan Meladze

SERBIA

HORES-The Serbian Hotel and Hospitality Industry Association

www.hores.rs

President of the Board: Aleksandar Vasiljević
Director: Dr. Georgi Genov

SWITZERLAND

GASTROSUISSE-Verband für Hotellerie und Restauration

www.gastrosuisse.ch

President: Casimir Platzer
CEO: Daniel Borner

HOTELLERIESUISSE-Swiss Hotel Association

www.hotelleriesuisse.ch

President: Andreas Züllig; CEO: Claude Meier

TURKEY

TUROB-Hotel Association of Turkey

www.turob.com

President: Müberra Eresin
Secretary General: Ismail Taşdemir

TTYD-Turkish Tourism Investors' Association

<http://ttyd.org.tr/>

Chair of the Board: Oya Narin
Secretary General: Hale Altan

UNITED KINGDOM

UKHospitality

www.ukhospitality.org.uk

Chairman: Nick Varney; CEO: Kate Nicholls

HOTREC EXECUTIVE COMMITTEE

Jens Zimmer Christensen

President of HOTREC, President of HORESTA Denmark

Marc Van Muylders

Vice-President of HOTREC, Vice-President of HORECA Bruxelles

Adrian Cummins

Treasurer of HOTREC, Chief Executive of Restaurant Association of Ireland (RAI)

Julian Bystrzanowski

ExCom Member, Vice-President Chamber of Commerce of the Polish Hotel Industry (IGHP)

Antonio Flamini

ExCom Member, Member of the bureau of Federazione Italiana Pubblici Esercizi (FIPE)

Ramón Estalella Halffter

ExCom Member, Secretary General of Confederación Española de Hoteles y Alojamientos Turísticos (CEHAT)

Laurent Duc

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Markus Luthe

ExCom Member, CEO of Hotelverband Deutschland (IHA)

Václav Stárek

ExCom Member, President of the Czech Association of Hotels & Restaurants (AHRCR)

Morten Thorvaldsen

ExCom Member, Vice-President of Norwegian Hospitality Association (NHO)

Alexandros Vassilikos

ExCom Member, President of Hellenic Chamber of Hotels (HCH)

Joan Gaspart

ExCom Observer

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Chair, Treasurer of Union des Métiers et des Industries de l'Hôtellerie (UMIH)

Angelo Giuseppe Candido

Member, Head of social dialogue, training and social affairs area, Federalberghi

Mag. Santa Graikste

CEO of Association of Latvian Hotels and Restaurants (AHRL)

Paul Schoormans

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