



# 2013|14 HOTREC Annual Report

**Hotrec**  
Hospitality Europe

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## Mission:

HOTREC is the umbrella Association of Hotels, Restaurants, Cafes and similar Establishments in Europe, which brings together 42 National Associations active in 27 European countries.

Our mission is to promote the hospitality industry's contributions to European society and represent, protect and defend its interests to the European Institutions.

# Foreword

by the Vice-President of the European Commission,  
Commissioner for Industry & Entrepreneurship

Dear readers,

I am pleased to have the opportunity to address you in this foreword to the 2013/2014 HOTREC Annual Report. Not only because it is an appropriate place to highlight the importance of the hospitality sector to the EU economy, but also because it is an excellent opportunity to summarise what has been the Barroso II Commission's contribution to the EU tourism industry during the past five years.

The diversity of the tourism sector enables it to make an estimated total contribution of 9% to EU GDP and employ 10% of the total EU workforce. Tourism is therefore clearly a key economic activity in generating growth and employment in the EU. It has the power to improve accessibility to remote regions, contribute to people's wellbeing, stimulate healthy aging, improve quality of life and promote our natural and cultural heritage. It also encourages entrepreneurial spirit, being a driving force for job creation, innovation and productivity.

Against the background of a rapidly deteriorating economic and social environment, and in the wake of the worst global financial crisis the EU has ever faced, our renewed EU tourism policy strategy has largely contributed to enhancing the potential of the tourism sector to contribute to Europe's endeavours to exit the crisis.

Within the framework of this strategy, the Commission has been developing several actions aiming at boosting the competitiveness of the EU tourism industry. These actions have been focusing on promoting our common cultural and industrial heritage, encouraging sustainable and responsible tourism management, innovation, and improving socio-economic knowledge in tourism.

I am especially proud that for the first time ever, we carried out an international tourism promotional campaign: "Europe, whenever you're ready".

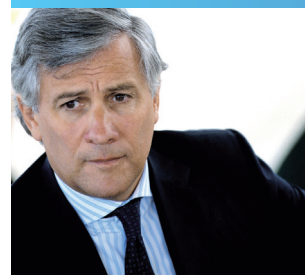
As EU Commissioner for entrepreneurship and tourism, I did my best to revamp international cooperation in the field of tourism, leading to regular dialogue on a sustainable tourism development.

I am glad to emphasise our collaboration with HOTREC in crucial policy areas, such as developing tourism for the older generation - as a continuation of the Calypso preparatory action - as well as in accessible tourism, accommodation safety, skills and competences of tourism professionals and tourism service quality. The Commission also strongly relied on the expertise and opinion of HOTREC and its members for the modernisation of EU rules on package holidays.

The Commission also valued HOTREC's input during its adoption of the Visa Code - proposals to seriously shorten and simplify the procedures for those wanting to come to the EU for short stays, and induce more cost savings and less bureaucracy, whilst maintaining the level of security. More flexible and accessible visa rules could mean as much as €130 billion extra in total direct spending over five years and could translate into some 1.3 million jobs in tourism and related sectors.

I am proud that I had the opportunity to act as political representative and impetus behind these stimulating and substantial improvements over the past five years. I must also congratulate HOTREC, as one of the main representatives of the EU tourism industry, for the role they played in shaping these actions, influencing the future of European tourism to the best interest of its businesses.

Needless to say, the work is not yet finished. These actions, as well as others in the future, will continue to be developed. I can only assure you that the industry, particularly HOTREC, will be strongly relied on when it comes to cooperation with private stakeholders. I sincerely hope that we can count on you sharing your knowledge and experience with us.



**Antonio Tajani**  
Vice-President of the  
European Commission

*Antonio Tajani*

# Key tourism facts & figures

by UNWTO Secretary General



Taleb Rifai  
Secretary General

The hotels, restaurants and cafés of Europe are a distinguishing mark of European lifestyle, culture and tourism.

Europe's tourism sector is today one of the pillars of the region's steadily growing economy despite various challenges, none the least the economic situation of recent years.

Tourism's expansion was marked by a key milestone in 2012, when one billion international tourists travelled the world in a single year for the first time in history. Despite the challenges in the world economy that mainly affected Europe, and even beyond UNWTO's expectations, tourism's momentum forged ahead in 2013. International tourist arrivals grew further by 5%, with 52 million more tourists, reaching a total of 1,087 million tourists crossing international borders. Even more significant, total export earnings from tourism in 2013 mirrored the 5% growth to hit a record high of US\$1.4 trillion, and accounting for as much as 6% of the world's total exports.

Europe enjoyed a particularly positive year, welcoming a solid 5% growth in international arrivals, reaching a total of 563 million visitors. In terms of international tourism receipts, Europe saw also a significant growth in 2013, reaching US\$ 489 billion (euro 368 billion), partly boosted by a stronger euro.

These are without doubt very welcome news for Europe, considering the lingering economic difficulties facing the region on its road from recession to recovery. Tourism has been proven to be a backbone for many European economies.

At this decisive stage of economic recovery, tourism represents a vital and viable solution revitalizing economies across the region, contributing in a decisive manner to the balance of payments and the creation of much needed jobs.

Such positive results are the consequence of a concerted effort among all companies operating in tourism and improved public policies for tourism.

In this regard, I commend the work of HOTREC for promoting the interests of the enterprises in Europe's hospitality industry and enabling a competitive environment suitable for the sector's sustainable growth.

UNWTO affirms its strong commitment to work together with HOTREC, a valued Affiliate Member and partner, with the shared vision of transforming tourism into a true driving force behind Europe's inclusive economic growth and social development.

A handwritten signature in black ink, which appears to read 'Taleb Rifai'.

## Message from HOTREC President and CEO

2013 was an excellent year for international tourism, which reached an unprecedented record of 1,087 billion tourist arrivals. Europe led growth in absolute terms, welcoming an additional 29 million arrivals, raising the total to 563 million, i.e. a 5% growth, which is double the region's average for the period 2005-2012.

This is good news for the hospitality industry, which directly employs 10 million people in Europe and supports 16.6 million jobs, representing 7.8% of the European workforce or one in every 13 jobs.

The promotion of tourism was one of HOTREC's main achievements during the past 12 months, e.g. the new visa package developed in close cooperation with the European Commission and TOURISMLink, the Business to Business online EU funded Platform.

HOTREC and its National Member Associations also achieved excellent results in the broader policy field, e.g. on copyrights and payment cards, which will positively impact SMEs' revenues. Furthermore, with the Brewers of Europe, HOTREC conducted a study on the hospitality industry's contributions to society across 31 European countries, which confirmed that the sector, together with tourism, represents the 3rd socio-economic activity in Europe.

HOTREC's harmonised hotel classification system, the HOTELSTARS Union, continued to increase its Membership, with Belgium, Denmark and Greece

joining in 2013, rising to 15 the countries committed to common criteria and procedures. HOTREC and its counterpart EFFAT, the European Federation of Trade Unions in the Food, Agriculture and Tourism sectors, together with the European Commission, launched the first Hospitality Skills Passport, an industry driven initiative aimed at facilitating job match and mobility across the European Union.

HOTREC political agenda was also strongly driven by the Digital Agenda. As many other stakeholders in Europe, the hospitality industry called the European Commission not to close the Google case and to ask Google to set fair online search practices. Competition cases were launched in France, Germany and Italy against Most Favourable Nation Clauses, with the goal for online travel agencies to set fair commercial practices vis a vis Hoteliers.

All along 2013/2014, HOTREC initiatives, not to forget a strong media outreach, were developed thanks to best practice-sharing amongst Members, which will see further developments in the months ahead.

We would like to thank the HOTREC Membership for its ongoing funding, the HOTREC team for their commitment and many achievements and our project partners for their support.



Kent Nyström  
President



Christian de Barrin  
CEO

THE HOSPITALITY  
INDUSTRY  
SUPPORTS 16.6  
MILLION JOBS  
IN EUROPE  
REPRESENTING  
7.8% OF THE  
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WORKFORCE OR  
ONE IN EVERY  
13 JOBS.

## The hospitality industry's contributions to European society

The hospitality industry is one of the key drivers of the European economy, both in terms of employment as well as of direct contribution to the economy.

### Contribution to European employment

The hospitality industry directly employs 10 million people, representing 4.7% of the total employment in Europe. It is a strong vehicle for youth employment in the economy, as 20% of the people employed are aged below 25 years, while in the overall economy they represent less than 9% of the total work force.

While hotels, restaurants, cafés and similar establishments employed year by year 2.9% more people in the first decade of the millennium, creating all together 2,5 million additional jobs, employment in Europe was overall only growing by an annual rate of 0.7%.

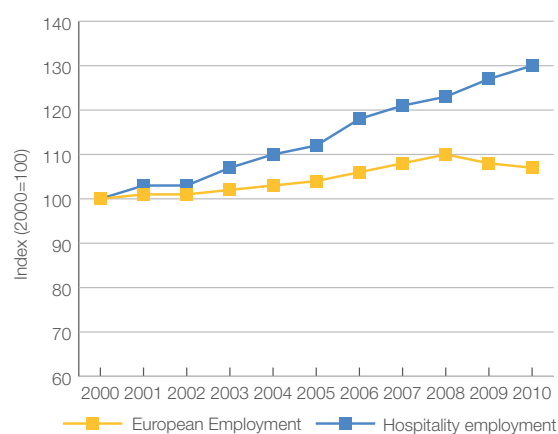
After 2008 it was one of the few industries that still kept creating hundreds of thousands of new jobs, despite the economic crisis, while in the overall economy unemployment was rising.

### Contribution to the economy

The European hospitality industry, together with the other tourism industries, is the 3rd largest socio-economic activity in Europe. It has shown an annual growth rate of 3.3% between 2000 and 2010, a higher figure than for the average annual GDP growth rate in Europe (3.2%).

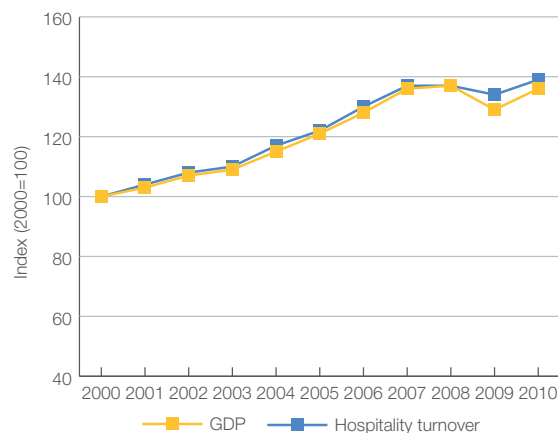
In terms of output, the industry realised an impact of 1000 billion EUR, or 8,1% of the total economic output. Within that the total turnover of the hospitality businesses in Europe was over 460 billion EUR in 2010.

EU and hospitality employment index (2000-2010)



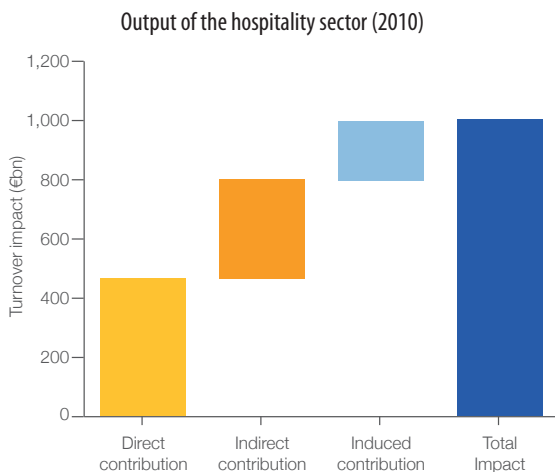
Source: EY study: The hospitality sector in Europe, September 2013

GDP and hospitality turnover index (2000-2010)



Source: EY study: The hospitality sector in Europe, September 2013

\*Source: Eurostat



Source: EY study: *The hospitality sector in Europe, September 2013*

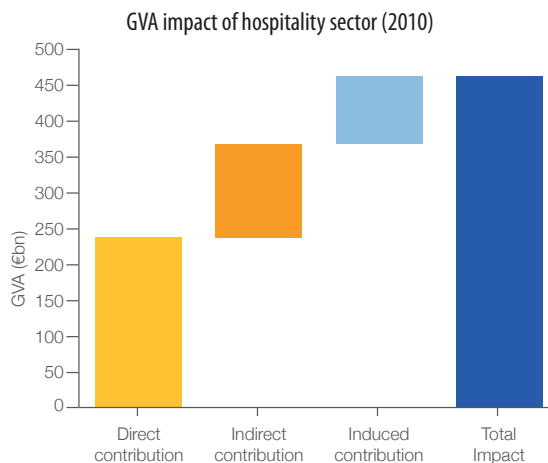
In 2010, the sector contributed around 3.7% of the total GDP, with around 460 billion EUR of gross value added. Out of this, 236 billion EUR was direct contribution, with a further 131 billion EUR generated through the supply chains.

The economic contribution of the hospitality industry is met via 1,8 million enterprises. 91% of them are family or micro-enterprises, employing fewer than 10 persons and 99% are small enterprises with a number of employees of not more than 50.

In fact, 60% of the value added by the whole industry is coming from those.

With an additional demand of 1,6 EUR generated in the wider economy for every 1 EUR spent in the sector, supporting the hospitality sector in a favourable environment adds value to the economy, driving growths and job creation.

The contribution of the hospitality industry to the tax revenues is significant as well, representing 126 billion EURs.



Source: EY study: *The hospitality sector in Europe, September 2013*

THE HOSPITALITY  
INDUSTRY  
CONTRIBUTES  
AROUND 3,7% OF  
THE TOTAL GDP

## Europe in the world tourism market

(Source: UNWTO World Tourism Barometer)

In 2013, Europe received 563 million international tourist arrivals, which represent 51% of all international arrivals around the world. In 2013, 5,4% more arrivals were registered than in 2012, which allowed an over average growth for Europe. Forecasts predict that by 2030 Europe can count on around 740 million international tourists, which represents a huge potential in terms of additional guests.

With regard to the expenditure of tourists, the European Union realised over 303 billion EUR in tourism receipts, which represents around 700 EUR of expenditure per arrival.



## Core policy achievements

HOTREC constantly strives to develop services to its Members that achieve measurable results for the benefit of the industry in Europe.

With this goal in mind, HOTREC successfully reached a broad number of policy achievements in 2013/2014.



## Copyright collective management organisation to be regulated

The hospitality industry is an important user of works protected by copyright, providing its customers with the opportunity to listen to music for example in a bar or to watch television in their hotel room. To make this possible, hospitality establishments negotiate licenses with collective management organisations.

### Fighting against prohibitive tariffs and un-transparent entities

For many years, the hospitality industry has complained about the challenges they experienced with collective management organisations, such as the lack of transparency of the tariffs and lack of efficiency, also including sky-rocketing prices for the renewal of licenses.

HOTREC therefore launched targeted campaigns to raise EU policy and decision-makers awareness; which resulted in a proposal from the European Commission in 2012. It was an important step forward, which, following a strong public affairs campaign in cooperation with other trade associations, met the EU institutions' agreement on right users' objectives and needs.

### More transparent practices and reasonable prices for licenses to be imposed

This new Directive will benefit hospitality businesses in their relations with collective management organisations, as follows:

- Tariffs should be reasonable and the criteria used should be justified;
- Licenses should be non-discriminatory and any refusal to grant a license should be motivated;
- Some information must be made public, such as the management fees, the policy for social and cultural funds, the complaint handling policy, etc.;
- Specific internal procedure will be put in place to avoid any conflict of interest;
- A public authority will be tasked in each Member State to control collective management organisations' compliance, while any right-user will be able to notify any breach of this Directive.

This means that hospitality companies will benefit from easier, fairer and more transparent negotiations, based on ad-hoc criteria with collective management organisations and from more reasonable tariffs.



HOSPITALITY  
BUSINESSES WILL  
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727 MILLION  
PAYMENT CARDS  
ISSUED IN THE  
EU IN 2011



TOWARDS  
REDUCED  
COSTS ON  
PAYMENT CARDS  
TRANSACTIONS  
AND MORE  
TRANSPARENT  
INVOICES FOR  
BUSINESSES

## Towards a sharp decrease of payment card fees for hospitality businesses

The use of a payment card has become extremely widespread, as it is an easy mean of payment. This is especially true for hospitality services, as customers often pay for a hotel stay or a restaurant meal with payment cards.

### Advocating for a legislation regulating payment card fees

Hospitality businesses pay a fee each time a payment card is used in their establishment. The biggest part of this fee is composed by the interchange fee, which is not negotiable and fixed by the giants of the payment industry. Given hospitality businesses' dependency on payment cards, they are forced to accept high fees and imbalanced contractual conditions.

Thanks to a close cooperation with EuroCommerce, some antitrust proceedings were carried out by the European Commission and resulted in the temporary regulation of interchange schemes run by MasterCard and Visa.

As a result, HOTREC and EuroCommerce registered a major success when the European Commission released on 24 July 2013 a proposal to strictly regulate interchange fees for payment cards, which was even strengthened in the Parliament's report adopted on 3 April 2014.

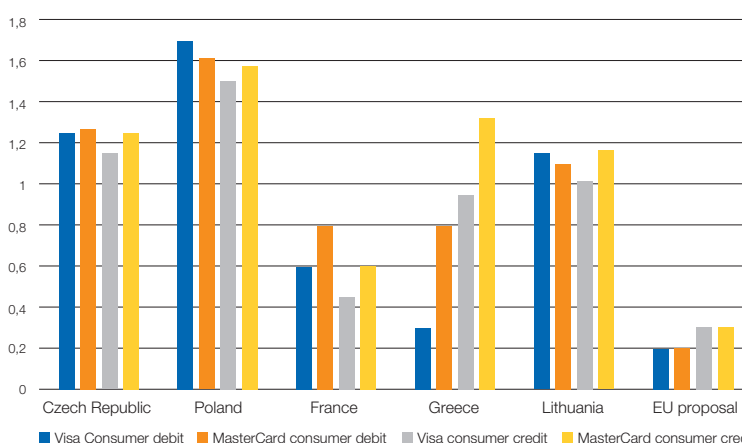
### Hospitality businesses to benefit direct reduced costs

According to the text voted by the European Parliament, hospitality businesses should benefit from the following changes:

- Interchange fees on debit cards will be capped at a maximum of either 0.2% of the transaction value or 7 eurocents (whichever the lower value), while interchange fees on credit cards will be capped at a maximum of 0.3% of the transaction value on all transactions;
- Commercial cards and large three-party schemes (e.g. Amex) would be regulated as well;
- Businesses would receive a more transparent bill with all costs and fees unblended;

These benefits now require the endorsement of the Council of EU Ministers to take full effect. Should they be confirmed, HOTREC's leadership will have directly benefited all hospitality businesses across Europe through reduced costs on most payment cards transactions and more transparent invoices.

Average domestic MIF levels in selected Member States in 2012



Source: European Commission

## A new visa policy to boost growth and jobs

On 5 April 2010, the Visa Code entered into force. Its implementation revealed itself to be too complex and an economic burden on potential tourists coming to Europe. Indeed, trips to attend interviews in the consulates are costly, consular cooperation does not seem to be effective, rules on where to lodge an application are misleading, etc.

HOTREC included visa in its priority list and transmitted to the European Commission, together with other tourism stakeholders, its main concerns.

### Visa facilitation procedures, especially targeting BRICS, are mostly welcome!

As a result of the tourism industry lobbying activities, the Commission released on 1st April 2014 a new Visa package. The main outcomes are the following:

- A Proposal for a Regulation on "Touring Visa", which allows visa applicants to remain in the Schengen area for a one year period (instead of 3 months);
- A Proposal for a revision of the Visa Code Regulation, which includes:
  - A clarification of the notion of main destination, making it easier for visa applicants to know which is the competent consulate to provide a visa;
  - Enhanced consular cooperation;
  - A facilitation foreseen for regular travellers;
  - The possibility for Member States to issue a temporary visa at the borders – in order to promote short term tourism;
  - The possibility for Member States to accept the lodging of applications by commercial intermediaries;
  - The shortening of the deadline for consulates to take a decision;
  - No need for the visa applicant to hold a travel medical insurance.

The results of the proposed legislation for the hospitality sector should be:

- An increase in tourism arrivals in Europe, especially from BRICS;
- A boost in growth and jobs.

HOTREC looks forward to its swift adoption by the European Parliament and the Council.

THE NEW VISA  
POLICY WILL  
ENHANCE THE  
COMPETITIVENESS  
OF THE HOSPITALITY  
SECTOR



THE HOTELSTARS  
UNION IS  
BECOMING THE  
CLASSIFICATION  
SYSTEM IN MORE  
AND MORE  
EUROPEAN  
COUNTRIES, 15  
UP TO NOW, WITH  
CRITERIA UPDATED  
AS OF 2015.

## Hotelstars Union – a refreshed European hotel classification system for the benefit of customers

### The birth of a common European hotel classification

In December 2009, 7 HOTREC Members founded the Hotelstars Union, a common European hotel classification system, which set 270 criteria for 5 years. Since its creation, 8 additional European countries joined the initiative.

Over the last 5 years, both the European Parliament, in its last own-initiative report on tourism, and the European Commission, acknowledged this initiative and identified it as the way forward in terms of a common European hotel classification.



### The first adjustment of the system

During 2013 and 2014, the Hotelstars Union Members developed the first common revision of the criteria catalogue. A study commissioned by Hotelstars Union, backed by a specific European public survey, assisted the Hotelstars Union members in identifying the key points for the revision process.

As a result of negotiations, the following criteria for hotel classification shall gain more weight from 2015 in the around 30.000 classified hotels in the participating countries:

- Better sleeping comfort;
- Better online visibility provided by hotel websites;
- Better telecommunication opportunities also in lower category hotels;
- Better food and beverages availability in all types of hotels.

HOTREC and Hotelstars Union's 15 Members, have proven that a common European hotel classification system is achievable with the cooperation of the hotel Associations across Europe. The willingness and the commitment of more and more countries joining the initiative (Belgium, Denmark and Greece in 2013) shows that the Hotelstars Union is the way forward to a unified system across Europe.

## Online distribution – The European hotel sector to regain control over their business

Online distribution has become a number one priority for the hospitality industry as already over 33% of hotel bookings are made via real time online channels, including for a major part, Online Travel Agents. Furthermore, the oligopoly of a few dominant market players in the distribution online value chain has widespread unfair commercial practices. One particular aspect of these practices is the inclusion in contracts, between OTAs and hotels, of clauses that ensure the distribution partner best prices and a guaranteed access to the entire inventory of the hotels.

### Common efforts for fair distribution of hotel rooms

HOTREC launched action against such practices by promoting 19 Benchmarks of Fair Practices in Online Distribution since the end of 2010, which were updated in 2012. Moreover, in order to get a clear overview and a better understanding of all booking channels, HOTREC launched in 2014 a European study to assess the hotel distribution market across the continent.

### Most Favoured Nations clauses to be banned?

#### A precedent in Europe is available

On 20 December 2013, the German competition authority (Bundeskartellamt) decided that the best price clauses included in the General terms and conditions of the contracts of HRS (Hotel Reservation Service), one of the dominant OTAs in Germany, are breaching EU competition law. HRS is therefore from 1 March 2014 obliged to remove such clauses in its contracts with hotels in Germany.

The German authorities found that the clauses are hindering the availability of lower hotel prices elsewhere, both online and offline. Therefore, it cannot be argued that such clauses benefit consumers. As similar terms are applied by other dominant market players in Germany as well, such as Expedia and Booking.com, investigation by competition authorities has been launched also in relation to their practices.

First reactions on the market are already visible in Germany, as hotels are starting already to offer lower prices than the ones available on OTAs' website.

In France and Italy, similar competition investigations were launched and it is now up to the European Commission to decide whether or not to open a European case.



COMPETITION  
AUTHORITIES  
ACROSS EUROPE  
INVESTIGATE THE  
NECESSITY TO BAN  
CONTRACT CLAUSES  
GUARANTEEING  
BEST CONDITIONS  
FOR OTAs.

## TOURISMLink – linking tourism companies to the digital market

Tourism is more and more going digital. Internet has changed dramatically the way in which both consumers and tourism companies are acting on the market. Online distribution of tourism products is becoming every day more and more relevant for companies.

As the tourism sector is mainly composed of SMEs, their adaptation in the ICT sector is essential to foster their competitiveness. Therefore, being fully connected and bookable through internet, provide companies with a true competitive advantage.

For all these reasons, HOTREC together with its consortium partners has set-up **TOURISMLink**, a European Commission funded project.

TOURISMLink is an online platform that aims at facilitating the contact, flow of information, interaction, business transactions and thus, competitiveness, amongst tourism businesses in Europe, SMEs in particular. The platform aims at easing relationships between the supply side (i.e. hotels, similar accommodation establishments and complementary offer) and the demand side (i.e. travel agencies and tour operators).



### TOURISMLink's benefits

The advantages of joining TOURISMLink for hospitality companies are:

- The connection to travel agencies / tour operators in source markets of 9 countries;
- An opportunity to increase occupancy and develop revenues;
- An opportunity to gain visibility and multiply hotels marketing and promotion;
- An opportunity to reduce technological costs for hotels to integrate into the digital value chain, as the platform is compatible with existing ICT systems, solving, thus, the current interoperability problems;
- An opportunity to be connected to other existing sales channels.

As a result, tourism companies will have fewer costs and will make more profits/revenues when making business transactions. TOURISMLink is the open door to new business opportunities.

HOTREC has been actively involved in setting-up TOURISMLink, a platform designed by the industry for the industry, which will further connect SMEs to the global digital value chain, thus fostering their competitiveness.

## Facilitating job mobility in the hospitality sector across Europe

Since 25 years, HOTREC is the EU official representative of the employers and is engaged in a sectoral social dialogue at EU level with its trade union counterpart EFFAT on issues of common interest such as undeclared work, CSR and trends on hospitality.

Since 2006, skills, qualifications and employment opportunities have topped the hospitality social partners' agenda. In order to foster labour mobility within the sector, EFFAT and HOTREC, have jointly prioritised a list of skills per service area in Europe.

### Fostering labour mobility: launch of the European Hospitality Skills Passport

EFFAT-HOTREC skills list served as a platform to develop the first European Hospitality Skills Passport, which is aimed at:

- Facilitating mobility within the hospitality sector in the European Union;
- Fostering a better match of offer and demand in employment in the hotel and restaurant sector;
- Allowing workers to document their qualifications and skills acquired through education and vocational training and on the job;
- Allowing employers to assess the skills and experiences of job candidates from their own and other EU countries.

The Hospitality Skills Passport will serve as a model as the European Commission objective is to create skills passports for all sectors in order to facilitate labour mobility.

### Hospitality: a key industry for job creation

The hospitality sector employs directly some 10 million people in Europe. Moreover, the industry keeps creating jobs despite the crisis and has a high level of workers' mobility, as knowledge of foreign languages and experience with other countries' culture is critical.

The Hospitality Skills Passport, accessible in all languages and in all EU countries will enhance the mobility of workers within the sector and be launched in June 2014 through EURES, the European job Mobility Portal.

7.8 MILLION EU  
CITIZENS ARE  
ECONOMICALLY  
ACTIVE IN ANOTHER  
EU COUNTRY,  
REPRESENTING 3.2%  
OF THE EU LABOUR  
FORCE



«THE TOURISM INDUSTRY HAS BEEN ONE OF THE STRONGHOLDS OF EUROPEAN ECONOMY DURING THE ECONOMIC CRISIS. IT CONTINUES TO BE A SOUND ECONOMIC DRIVER FOR THE EU RECOVERY.»

European Commission  
Vice-President  
Antonio Tajani,  
HOTREC General Assembly,  
Rome, 10 April

## Core events

During the past 12 months, HOTREC organised a number of high-level events aimed at promoting the hospitality industry's benefits to society towards European policy and decision-makers, developing networking opportunities and providing Members with a best practice sharing platform.

### The role of the hospitality industry in re-launching growth 17 September 2013 - European Parliament

HOTREC and the Brewers of Europe co-organised a high-level dinner debate in the European Parliament entitled *'Toasting Europe's future: the role of the hospitality industry in re-launching growth'*.

The aim of this event was to present a new study carried out by EY (formerly Ernst & Young) on the contribution of the European hospitality to the EU economy across 31 European countries. This study shows that the hospitality industry plays a critical role in fighting youth unemployment and is essential for jobs, growth and other sectors' wealth.

The event was attended by many EU officials and MEPs. Guest speakers included MEP Paul Rubig, MEP Emma McClarkin, Lukás Vesely from the Cabinet of Commissioner Andor (responsible for Employment, Social Affairs and Inclusion), as well as Pierre-Olivier Bergeron, the Secretary General of the Brewers of Europe and HOTREC President, Kent Nyström.



### HOTREC 68th General Assembly attended by European Commission Vice-President Antonio Tajani and UNWTO Secretary General Taleb Rifai

On 10 April 2014, the Vice-President of the European Commission Antonio Tajani and the Secretary General of the UNWTO participated to HOTREC 68th General Assembly as guest speakers.

Antonio Tajani, also Commissioner for Industry & Enterprise, presented the recent achievements of the European Commission on tourism and promoted the excellent cooperation with HOTREC. UNWTO Secretary General Rifai stressed the societal and economic potential still to be exploited in the tourism industry in Europe.

A press-conference was also co-organised by HOTREC and the European Commission, during which was presented the new EU visa package. Its aim is to facilitate visa processing, in order to boost the number of tourist arrivals in Europe, especially from BRICS countries, and create jobs in the sector.



Joint press conference  
HOTREC/European Commission



## Best practice sharing activities amongst Members

HOTREC serves as a hub for its Members to share their best practices in priority fields to the hospitality industry. As part of it, several innovative practices were presented during the past year, such as “bio-waste in restaurants”, and the “promotion of tourism through local gastronomy”.

### Collecting bio-waste in restaurants to transform them into energy

Businesses active in the food chain, such as restaurants, today face the problem of the management of their bio-waste. This is both an environmental and economic issue. During HOTREC 68th General Assembly, the Synhorcat (Syndicat National des Hôteliers, Restaurateurs, cafetiers et traiteurs), one of HOTREC French members, presented its new initiative on bio-waste.

This initiative consists in mandating a company to sort-out the bio-waste, collect it and transfer it to a methanisation factory, where it is transformed into energy. It is currently being successfully tested in Paris. It is estimated that 950 Kg of fertilisers, 350 Kwatts of electricity and 350 Kwatts of heating can be produced with 1 ton of bio-waste. Given the amount of bio-waste in restaurants (roughly 200.000 kg every year in Paris alone) this project has a huge potential in both environmental and economic terms.

### Fostering tourism through the promotion of the local gastronomy

Tourism is essential for the hospitality industry, as it yields substantial results in terms of growth, revenues and employment. As part of HOTREC best-practice sharing activities, the Hellenic Chamber of Hotels presented a new way of marketing tourism, which combines the promotion of local gastronomy and healthy diets.



This initiative called the “Greek breakfast” is designed to promote local gastronomy through Greek hotels, which will contribute to the enrichment of Greece’s tourism services. The “Greek Breakfast” initiative highlights the gastronomic diversity of each region, which is part of their cultural identity, therefore allowing tourists to experience the wealth of the Greek cuisine.

It is also relying on the promotion of high quality products that are part of the healthy Mediterranean diet. The motto of that campaign is “*Discover the Greek gastronomy in your hotel at breakfast*”.

Several hundreds of hotels already participate in this programme.



**Franck Trouet,**  
Director General of the Synhorcat,  
presenting their initiative  
on bio-waste in  
restaurants

HOTREC  
SERVES AS  
A HUB FOR ITS  
MEMBERS TO  
SHARE BEST  
PRACTICES



**Agni Christidou,**  
CEO of the Hellenic Chamber of Hotels,  
presenting the  
“Greek breakfast” initiative

## HOTREC 2014/2015 Strategy

Over the past 10 years, HOTREC strongly increased its Membership to 42 National Member Associations in 27 European countries, both to reflect the EU enlargement and respond to the call from European countries to join the Association. HOTREC strategy and activities have strongly benefited the hospitality industry in Europe, through its role of intelligence gathering on EU regulatory and market developments and centre of expertise for its Members. Along with its Manifesto, which lists 16 priorities for 2014-2019, HOTREC has set two main priorities for the next 12 months.

### Developing stronger relations with EU policy-makers

The 2014 European elections will mark a turning point in EU public affairs, as they mean the election of a new European Parliament and the renewal of the college of Commissioners. HOTREC will use this crucial moment to strengthen its position, in order to become more influential on political and legislative issues that might impact the competitiveness of hospitality businesses.

HOTREC will therefore largely focus its efforts in 2014/2015 on the following:

- Develop close relationships with the newly elected Members of the European Parliament active in key committees;
- Gather support for the creation of an intergroup on tourism in the European Parliament. This intergroup should associate all relevant stakeholders and monitor EU developments with a likely impact on tourism;
- Ensure that HOTREC manifesto for 2014-2019 is largely implemented by EU decision makers;
- Raise further HOTREC profile at EU level through the organisation of events and seminars showing the importance of the industry and the challenges it faces;

### Providing direct benefits for members and hospitality businesses

HOTREC also needs to adapt to the new economic context. The current crisis has also hit hospitality businesses. It is therefore equally important for HOTREC to be able to provide additional services that truly matter to its members, to make them stronger and to make HOTREC an even more membership-attracting organisation.

With this goal in mind, HOTREC intends to:

- Develop best practices sharing platform and workshops in relevant areas (e.g. Peer to Peer, digital distribution, accessibility, sustainability, food and hygiene, etc.)
- Develop additional services for its members in order to foster their development;
- Develop a stronger membership base and enhance its cooperation with non-member organisations that might bring an added value to both HOTREC and its members.



ALONG WITH  
ITS MANIFESTO,  
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HAS SET 2 MAIN  
PRIORITIES FOR  
2014/2015

# The 16 priorities of the European hospitality sector for 2014-2019

## In general

### ▶ **Subsidiarity must prevail**

The EU should refrain from legislating on aspects with no-justified single market dimension.

### ▶ **Smarter regulation**

Self-regulation should be promoted, and burdensome over-regulation avoided.

### ▶ **Cut red tape**

The reduction of administrative burden is key to facilitating the competitiveness of enterprises.

### ▶ **Easier access to funds for SMEs**

The tourism industry should have more access to EU financial instruments.

## EU policies

### ▶ **Social Affairs - Do not undermine job creation!**

It is necessary to avoid new EU employment legislation which would damage the industry's excellent record in increasing jobs, especially for young people. Flexibility of working time arrangements is crucial for the maintenance of service within the hospitality industry.

### ▶ **Distribution channels - Ensure fair competition in online distribution!**

Enforced best price guarantees due to the dominant position of Online Travel Agents (OTAs) make entrepreneurs lose control over their prices and businesses. The dominant position of OTAs needs to be reversed.

### ▶ **Visa Policy - Facilitate the entrance of tourists to Europe!**

The use of intelligent technical solutions to facilitate visa procurement, in particular for all BRICS, is crucial. The contribution of tourism to the EU economy needs to be taken into account, as well as security issues.

### ▶ **Official controls in restaurants - No mandatory inspection fee!**

An EU proposal intends to make restaurants pay a fee covering the cost of inspections. This fee will be a tax. As there is no single market impact in the case of restaurants, this should be an option for Member States, not an obligation.

### ▶ **Accessibility - Consider the burdens on SMEs!**

In order to be efficient, any future legislation should stay as much as possible at national level. Flexibility and reasonable requirements are the key drivers for success.

### ▶ **Data Protection - No extra burdens for SMEs!**

The future Regulation should not impose new obligations on the industry, especially the requirement to appoint a Data Protection Officer.

### ▶ **Copyright - Users also need clear regulation of the audio-visual sector!**

After the adoption of the new Directive on collective management of copyright, similar EU legislation shall also regulate the audio-visual sector: more transparency and one-stop-shops are needed to protect right-users.

### ▶ **Package Travel - Do not impair hotel bookings!**

The legal regime applicable to hotel bookings covered by a new package travel Directive should not be less favourable than the existing legal framework. More jobs will be created, without decreasing consumer protection, if the new Directive applies only when there is a travel/transport element.

### ▶ **Payment cards: Interchange Fees (IFs) must come down!**

IFs violate competition law, increase prices and are well above the real cost of processing cards. IFs should be banned for debit cards and capped for credit cards.

### ▶ **Food in restaurants: Ensure the use of fresh food is still possible!**

The recently adopted Food Information Regulation will make it harder for restaurants to use fresh food. Any future EU legislation should not result in an effective ban on the use of fresh food.

### ▶ **VAT rates - Maintain reduced rates for tourism!**

Reduced VAT allows for a competitive Europe as a tourism destination, including the creation of new jobs. Member States should continue to have the option to apply reduced VAT rates to hospitality services.

### ▶ **Private accommodation: Level playing field for all participants in tourism businesses!**

The ever increasing number of owners renting private apartments and holiday homes as tourist accommodation, especially through online distribution channels, and without always having to abide by the regulations applying to the hospitality sector, constitutes a threat to consumer protection and to jobs in the hotel industry.

# Meet the team

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**Access the Membership** ▶

## HOTREC FULL MEMBERS

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### AUSTRIA

APHA-Fachverband Hotellerie

[www.hotelverband.at](http://www.hotelverband.at)

President: Dr. Klaus Ennemoser

CEO: Mag. Matthias Koch

APRA-Fachverband Gastronomie

[www.gastronomieverband.at](http://www.gastronomieverband.at)

President: KommR. Helmut Hinterleitner

CEO: Dr. Thomas Wolf

VVAT- Austrian Professional Copyright Users Association

[www.vvat.at](http://www.vvat.at)

President: Komm.Rat Fritz Kaufmann

CEO: Mag. Andreas Hüttner

### BELGIUM

Fed. Ho.Re.Ca. Bruxelles-Brussel

[www.horecabruxelles.be](http://www.horecabruxelles.be)

President and CEO: Yvan Roque

HORECA Vlaanderen

[www.horecavlaanderen.be](http://www.horecavlaanderen.be)

President: Filip Vanheusden

CEO: Danny Van Assche

Fed. Ho.Re.Ca. Wallonie

<http://horecawallonie.be>

President: Thierry NEYENS

CEO: Pierre PORIAU

### THE CZECH REPUBLIC

AHRCR-The Czech Association of Hotels and Restaurants

[www.ahr-cr.cz](http://www.ahr-cr.cz)

President: Ing. Václav Stárek

General Secretary: Ing. Klára Zachariášová

### CYPRUS

CHA-Cyprus Hotel Association

[www.cyprushotelassociation.org](http://www.cyprushotelassociation.org)

President: Haris Loizides

Director General: Zacharias Ioannides

### CROATIA

UPUHH-Association of Employers in Hospitality Industry

[www.upuhh.hr](http://www.upuhh.hr)

President: Kristian Šustar

CEO: Iva Bahunek

### DENMARK

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

[www.horesta.dk](http://www.horesta.dk)

President: Jens Zimmer Christensen

CEO: Katia K. Østergaard

### ESTONIA

EHRA-Estonian Hotel and Restaurant Association

[www.ehrl.ee](http://www.ehrl.ee)

President: Verni Loodmaa

General Manager: Raigo Triik

### FINLAND

FHA-Finnish Hospitality Association

[www.mara.fi](http://www.mara.fi)

President: Mikko Merivirta

CEO: Timo Lappi

### FRANCE

CPIH-Confédération des Professionnels Indépendants de l'Hôtellerie

[www.cpih-france.com](http://www.cpih-france.com)

Confederal President: Gérard Guy

Secretary General: Alain Boutin

FAGIHT-Fédération Autonome Générale de l'Industrie Hôtelière Touristique

[www.fagiht.fr](http://www.fagiht.fr)

President: Claude Dumas

Director General: Catherine De Bruyne

GNC-Groupement National des Chaînes

[www.umih.fr](http://www.umih.fr)

President: Jacques Barré

Administrator: Samuel Lacombe

SYNHORCAT-Syndicat National des Hôteliers, Restaurateurs, Cafetiers et Traiteurs

[www.synhorcat.com](http://www.synhorcat.com)

President: Didier Chenet

Director General: Franck Trouet

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

[www.umih.fr](http://www.umih.fr)

President: Roland Héguy

Director General: Philippe Delterme

### GERMANY

DEHOGA-Deutscher Hotel-und Gaststättenverband

[www.dehoga.de](http://www.dehoga.de)

President: Ernst Fischer

CEO: Ingrid Hartges

IHA-Hotelverband Deutschland

[www.hotellerie.de](http://www.hotellerie.de)

President: Fritz G. Dreesen

CEO: Markus Luthe

### GREECE

HCH-Hellenic Chamber of Hotels

[www.grhotels.gr](http://www.grhotels.gr)

President: George Alex. Tsakiris

CEO: Dr. Agni Christidou

### HUNGARY

HHRA-Hungarian Hotel and Restaurant Association

[www.hah.hu](http://www.hah.hu)

President: Dr. Ákos Niklai

General Secretary: István Kovács

### IRELAND

IHF-Irish Hotels Federation

[www.ihf.ie](http://www.ihf.ie)

President: Stephen McNally

CEO: Tim Fenn

RAI-Restaurants Association of Ireland

[www.rai.ie](http://www.rai.ie)

President: Padraic Óg Gallagher

Chief Executive: Adrian Cummins

### ITALY

FEDERALBERGHI-Federazione delle Associazioni Italiane Alberghi e Turismo

[www.federalbergghi.it](http://www.federalbergghi.it)

President: Cavaliere del Lavoro Bernabò Bocca

Director General: Dott. Alessandro Massimo Nucara

FIPE-Federazione Italiana Pubblici Esercizi

[www.fipe.it](http://www.fipe.it)

President: Dott. Lino Enrico Stoppani

Director General: Dott. Marcello Fiore

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## LATVIA

AHRL-Association of Latvian Hotels and Restaurants

[www.hotels-restaurants.lv](http://www.hotels-restaurants.lv)

President: Janis Valodze

CEO: Mg. Santa Graikste

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## LITHUANIA

LHRA-Lithuanian Hotel and Restaurant Association

[www.lvra.lt](http://www.lvra.lt)

President: Evalda Siskauskiene

Managing Director: Egle Dinkiene

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## LUXEMBOURG

HORESCA- Fédération Nationale des Hôteliers, Restaurateurs et Cafetiers

[www.horesca.lu](http://www.horesca.lu)

President: Alain Rix

CEO: François Koepf

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## MALTA

MHRA-Malta Hotels and Restaurants Association

[www.mhra.org.mt](http://www.mhra.org.mt)

President: Paul Bugeja

CEO: Andrew Agius Muscat

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## THE NETHERLANDS

KHN-Koninklijk HORECA Nederland

[www.khn.nl](http://www.khn.nl)

Chairman of the Board: Toon Naber

General Director: Lodewijk van der Grinten

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## PORTUGAL

APHORT- Associação Portuguesa de Hotelaria, Restauração e Turismo

[www.aphort.com](http://www.aphort.com)

President: Rodrigo Pinto Barros

Executive Deputy President: António Condé Pinto

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## SLOVAKIA

ZHRSR- The Slovak Association of Hotels and Restaurants

[www.zhrs.sk](http://www.zhrs.sk)

President: Patrik Bočay

Secretary General: Marek Harbulák

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## SPAIN

CEHAT-Confederación Española de Hoteles y Alojamientos Turísticos

[www.cehat.com](http://www.cehat.com)

President: Juan Molas

Secretary General: Ramón Estalella

FEHR-Federación Española de Hostelería

[www.fehr.es](http://www.fehr.es)

President: José M<sup>o</sup> Rubio Marín

Secretary General: Emilio Gallego Zuazo

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## SWEDEN

VISITA-Swedish Hospitality Industry

[www.visita.se](http://www.visita.se)

President: Maud Olofsson

CEO: Eva Östling

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## THE UNITED KINGDOM

BBPA-British Beer and Pub Association

[www.beerandpub.com](http://www.beerandpub.com)

Chairman: Jonathan Neame

CEO: OBE Brigid Simmonds

BHA-British Hospitality Association

[www.bha.org.uk](http://www.bha.org.uk)

President: Alan Parker

CEO: Ufi Ibrahim

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## HOTREC ASSOCIATE MEMBERS

### NORWAY

NHO Reiseliv-Norwegian Hospitality Association

[www.nhoreiseliv.no](http://www.nhoreiseliv.no)

President: Ole Warberg

CEO: Kristin Krohn Devold

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### HOTREC OBSERVERS

#### SWITZERLAND

GASTROSUISSE - Verband für Hotellerie und Restauration

[www.gastrosuisse.ch](http://www.gastrosuisse.ch)

President: Klaus Künzli

Deputy Director: Hannes Jaisli

HOTELLERIESUISSE - Swiss Hotel Association

[www.hotelleriesuisse.ch](http://www.hotelleriesuisse.ch)

President: Guglielmo L. Brentel

CEO: Dr. Christoph Juen

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#### TURKEY

TUROB-Touristic Hotels & Investors Association

[www.turob.org.tr](http://www.turob.org.tr)

President: Timur Bayindir

General Manager: Ismail Taşdemir

TÜROFED-Turkish Hoteliers Federation

[www.turofed.org.tr](http://www.turofed.org.tr)

President: Osman Ayik

General Secretary: Savaş Çolakoğlu

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### Members of the HOTREC Executive Committee

#### Kent Nyström,

HOTREC President, President of Hotel Rusthållargården AB

#### Mag. Susanne Kraus-Winkler,

HOTREC Vice-President, Vice-President of APHA, Fachverband Hotellerie, Managing partner of the LOISIUM Wine & Spa Resort Hotels and LOISIUM Alsace SAS

#### Dr. Akos Niklai,

HOTREC Treasurer, President of HHRA, Hungarian Hotel and Restaurant Association, Managing Director of Kárpátia Hospitality Co

#### Ramon Estalella,

HOTREC EXCOM Member, Secretary General of CEHAT, Confederación Española de Hoteles y Alojamientos Turísticos

#### Markus Luthe,

HOTREC EXCOM Member, CEO of IHA-D, Hotelverband Deutschland (IHA)

#### Marinus Cordesius,

L.M, HOTREC EXCOM Member, Director Policies/International Affairs of KHN, Koninklijk HORECA Nederland

#### Dr. Agni Christidou,

HOTREC EXCOM Member, CEO of HCH, Hellenic Chamber of Hotels

#### Didier Chenet,

HOTREC EXCOM Member, President of SYNHORCAT, Syndicat National des Hôteliers, Restaurateurs, Cafetiers et Traiteurs, Co-President of GNI, Groupement National des Indépendants, President of QUARARE

#### Adrian Cummins,

HOTREC EXCOM Member, CEO of RAI, Restaurant Association of Ireland

#### Bernd Geyer,

HOTREC Honorary President

#### Joan Gaspart,

HOTREC EXCOM Observer, Vice President EHF, European Hospitality Foundation, President of HUSA HOTELS

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