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# 2019 EU ELECTIONS

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**WHITE PAPER FOR  
HOSPITALITY IN EUROPE**

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**TOWARDS SUSTAINABLE  
TOURISM IN EUROPE**



## VISION

Hospitality is at the heart of the European tourism development by fostering the industry's growth, jobs and innovation and by unlocking its potential.

## MISSION

HOTREC is the umbrella Association of Hotels, Restaurants, Bars and Cafes and similar establishments in Europe, which brings together 42 National associations in 30 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 kind of relevant stakeholders;
- Foster knowledge sharing and best practice among its Members, in order to further promote innovation;
- Act as a platform of expertise for the European hospitality industry.

HOTREC is a signatory and a partner of



Global Code of Ethics  
For Tourism  
For Responsible Tourism



PARTNER OF:

**One planet**  
travel with care

The One Planet Network is the network of the 10 Year Framework of Programmes on Sustainable Consumption and Production.



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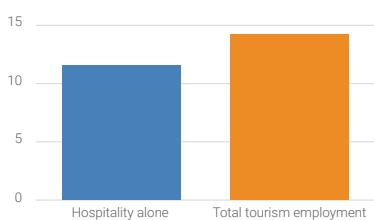
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# WHAT HOSPITALITY MAKES FOR SOCIETY

The hospitality sector is one of the key drivers of the European economy and European tourism, both in terms of employment as well as of direct contribution to the economy (tourism contributes to 5 % of GDP\*). Indeed, the hospitality industry alone created 1,6 million jobs between 2013 and 2016 taking its workforce from 10,3 million employees to 11,9 million, while the number of enterprises raised from 1,82 to almost 2 million. Together with tourism, the hospitality sector is the 3<sup>rd</sup> largest socio-economic activity in the EU.

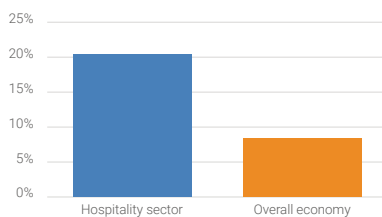
Tourism employment (million workers)



### A sector which employs 11,9 million workers in Europe

Hospitality is a particularly significant sector in terms of employment. Hospitality businesses alone provide for 11.9 million jobs directly, representing 80 % of the total EU tourism workforce. It is composed of 2 million hospitality enterprises, 90 % of which being micro enterprises, among which 200.000 hotels and almost 1 million restaurants and similar establishments.

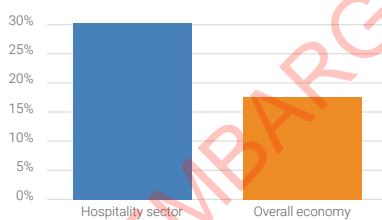
Youth employment (< 25 years)



### A sector providing jobs to the young: 20% are below 25 years

In the overall economy, the unemployment rate of people older than 25 years amounted to 6,8 % in 2017, while youth (aged below 25 years) unemployment was of 16,8 % in the EU. Conversely, while in the overall economy only 8,2 % of the persons employed are aged below 25 years, this figure in the hospitality industry amounts to 20,2 %. This shows the big potential of the sector in fighting youth unemployment.

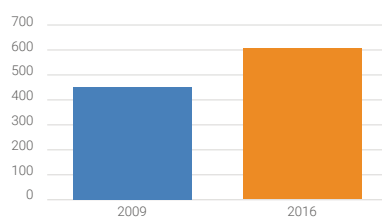
Employment of relatively unskilled



### A key player for social inclusion: 30% are relatively unskilled

The hospitality sector plays an important role in social inclusion, offering the first job experience for many young people. It also offers jobs to relatively unskilled people, as 30,2 % have a lower secondary education or under, compared to 17,7 % in the overall economy. Last, but not least, the hospitality industry is also a sector being significant in the employment of women. While in the overall economy 46 % of people employed are women, in the hospitality sector this figure rises to 54,1 %.

Annual turnover in billion EUR



### A key enabler for growth in Europe: +35% turnover in 7 years

The European hospitality sector is a key contributor to growth in Europe. Between 2009 and 2016, the European hospitality sector's turnover increased by more than 35 %, reaching a total of 605 billion EUR in 2016.

# FOREWORD: UNITING EUROPE TOURISM BRINGS PEOPLE TOGETHER!



Tourism unites Europe. This is a people industry, which brings people together. Hospitality is at the heart of European tourism development. The industry employs 80% of the total EU tourism workforce, providing alone 11,9 million jobs thanks to its 2 million businesses, generating over 1,9 billion nights spent in 200,000 hotels, and millions of meals everyday in about 1 million restaurants and similar establishments.

The past 5 years paved the way to a stronger hospitality industry, engaged into innovation and transformation although experiencing a lack of skilled workers. Indeed, the sector alone created 1,6 million new jobs between 2013 and 2016.

One of HOTREC's key objective was the regulation of the collaborative economy to level the playing field while ensuring consumer protection. Good steps were taken in the right direction thanks to the excellent cooperation between EU Institutions and EU stakeholders. The industry also succeeded in raising policy makers appreciation on the need to shape a Regulation on transparency and fairness in platforms to business relations still to be adopted before the end of the current EU mandate. Another HOTREC key priority was to keep VAT rates low for hotels,

restaurants and tourism services within the reform of the VAT scheme, therefore further increasing the competitiveness of Europe; proposal still to be endorsed by the Council of the EU.

The industry also kept delivering its commitment to sustainability on a voluntary basis, with actions to reduce food waste and increase energy efficiency. It will further take roots during the next EU mandate through the further promotion of healthy and better nutrition in the sector.

But even more needs to be done! While global tourism grew at a pace of 7% in 2017 (8% in Europe), new opportunities and challenges are rising such as the need to develop sustainable tourism, and to further innovate and adapt services to new customer demands. This will require major quality investments that shall be addressed through a multi-stakeholder approach and partly funded by the EU (e.g. multiannual financial framework), including research on big data to better manage tourism flows, artificial intelligence and blockchains.

Better regulation and a new thinking on subsidiarity shall prevail and top the EU's agenda for the next 5 years. The digital economy will also remain one of HOTREC's key priorities for a more balanced online market as promoted in this White Paper. Last but not least, the industry will focus on training the workforce and respond to the shortage of skills to keep being the 3<sup>rd</sup> largest socio-economic activity in Europe.

Together with HOTREC Executive Committee and 42 Member Associations active in 30 European countries, we would like to thank the Members of the EU Institutions, and in particular of the European Parliament for the excellent cooperation developed over the past 5 years and look forward to an even stronger cooperation for the next EU mandate.

**Jens Zimmer Christensen**  
President of HOTREC

**Christian de Barrin**  
CEO of HOTREC



# 2014-2019 EU MANDATE: A STRONGER HOSPITALITY INDUSTRY

The hospitality industry has become an even stronger pillar of the European economy over the past few years. Indeed, the hospitality industry alone created 1,6 million jobs in Europe between 2013 and 2016 taking its workforce from 10,3 million employees to 11,9 million, while the number of enterprises raised from 1,82 to almost 2 million. Turnover also increased by 20% from 507 to 605 billion EUR over the same period. Improved European policy framework thanks to the excellent cooperation with the EU Institutions, as well as increased tourism demand drove the development of the sector, which is the 3<sup>rd</sup> largest socio-economic activity in Europe.

## COLLABORATIVE ECONOMY - Set up the European regulatory framework to allow for fair competition and to ensure consumer protection

The EU made significant steps towards tackling the challenges the rapidly developing 'collaborative' economy poses to the economy and society. The adoption of the related Commission Communication in 2016, the Commission short-term rentals accommodation workshops in 2017 and the Commission action in July 2018 obliging AirBnB to comply with basic rules are showing the increasing intensity with which Europe is ready to settle the drawbacks of the 'collaborative' economy. This was fully supported by the European Parliament report "On a European Agenda for the collaborative economy" published in June 2017. HOTREC pro-actively contributed to the matter since November 2015, first issuing a position paper and then defining five key pillars for a responsible and sustainable 'collaborative' economy.

## DIGITAL - Regulate platform to business relations to allow for fairness and transparency

The European Commission rightly identified the key challenges European (hospitality) businesses are facing vis-à-vis online platforms, namely the lack of transparency and fairness, which was also well addressed by the European Parliament report on online platforms published in June 2017. The upcoming adoption of the platforms-to-business Regulation and the newly created Platform Observatory shall help monitoring work-in-progress and draw the necessary lines of the Regulation's review which shall take place in 2022. One topic to be reviewed shall be platforms' restriction for businesses to offer different conditions on their own distribution channels, which is today already prohibited in 5 European countries.

## TAXATION – Reform the VAT scheme while continuing to allow for low rates for hospitality services

The European Commission proposed to amend the rules setting VAT rates in the European Union. It is essential that Member States continue to be able to apply reduced VAT rates to hospitality businesses, which proved to create jobs and growth as showed the HOTREC VAT report published in April 2017. This is also key for the competitiveness of Europe as a tourist destination, which growth of international tourism receipts lag behind growth rates of the world average. The European Commission and the European Parliament are both supporting this approach which still needs to be adopted by the Council.

## CONSUMER AFFAIRS – REFIT - Increasing transparency and fairness of online platforms for consumers

While buying products through online platforms keep increasing, HOTREC actively contributed to the EU institutions' efforts to modernise EU consumer legislation, namely increasing transparency and fairness. As a result of the excellent work of the European Commission and European Parliament at this stage, some widespread unfair commercial practices will be banned, consumer information on the online ranking of products will be enhanced and consumers will know if they are protected by EU consumer law when shopping online. The text still needs to be adopted at the time we are publishing this document.

## DATA PROTECTION – a framework reasonably adjusted to SMEs

Companies in the hospitality sector are not likely to process personal data that risks the rights and freedoms of their customers. On the other hand, their core business is not data processing. For these reasons, companies in the sector do not need, in principle, to develop impact assessments, prior consultations or to hire a data protection officer. This avoids more administrative and economic burdens to SMEs in the hospitality sector (90% of the businesses being micro-enterprises).



# 5 YEARS OF INTENSE COOPERATION WITH THE EUROPEAN PARLIAMENT



*"Tourism is a major industry in Europe, an essential part of the mosaic that makes up Europe's industrial fabric. It has spin-offs in the areas of trade, agrifoodstuffs, the cultural and creative industries, transport, construction and shipbuilding. The travel and tourism sector is one of our major job creators. In short, it is an industry that creates added value throughout the EU, it makes Europe a global leader in international tourism and it is 'the world's number 1 tourism destination'. As one of the main representatives of the EU tourism industry, HOTREC's role in shaping the future of European tourism is key in tackling the challenges this sector will undoubtedly face during the next term."*

Antonio Tajani, President of the European Parliament

*"I would like to thank HOTREC for fostering close cooperation and deliver constructive efforts for a growing hospitality industry in Europe. The sector is of enormous importance to our internal market and its consumers."*

Anneleen Van Bossuyt, Member of the European Parliament, Chair of the IMCO Committee



*"After 5 years we put tourism policy together on its deserved place in the political arena. With the clear policy and budget related position of the European Parliament we created the possibility to have a stronger Tourism representation in the coming years. HOTREC has a crucial role to maintain the constant development of Tourism industry."*

István Ujhelyi, Member of the European Parliament, Vice-Chair of the TRAN Committee

*"As Chair of the Tourism Intergroup in the European Parliament, I value HOTREC's participation and immense contribution to the policy work related to tourism, taking often leadership even on most challenging issues such as overtourism, as well as its extensive and continuous work to push European tourism towards sustainability."*

Claudia Tapardel, Member of the European Parliament, co-Chair of the Intergroup on European Tourism Development in the European Parliament



*"HOTREC is an exemplary organisation that is constantly engaged in constructive debate with decision-makers. They are effective and thorough. A pleasure to work with."*

David Casa, Member of the European Parliament



# 5 YEARS OF INTENSE COOPERATION WITH THE EUROPEAN PARLIAMENT



*"As the European Parliament's rapporteur on food waste I commend HOTREC and its members for their efforts in reducing food waste and for the meaningful input they provided to my policy work".*

Biljana Borzan, Member of the European Parliament

*"The cooperation with a serious service provider such as HOTREC was a successful promotion of tourism, emphasizing its significant role of supporting economic growth in a responsible and sustainable way."*

Isabella De Monte, Member of the European Parliament



*"Over the past 4 years, Tourism Policy gained its place at the EU agenda. The Manifesto on Tourism for Growth and Jobs have been the beginning where more than 40 EU Tourism stakeholders set clear objectives to support EU tourism development. Thanks to HOTREC's initiatives we pinpointed the challenges of the sector and the need for action. As Chair of the Tourism Working Group in SME Europe I am convinced that we made a historical step forward towards a better, sustainable and smart EU Tourism policy with the adoption, for the first time, of a budget line for Tourism for the next multiannual financial framework."*

Claudia Monteiro de Aguiar, Member of the European Parliament

*"The hospitality sector is an important part of the SME-driven backbone of our society and deserves to be heard in the European political process. HOTREC has been a reliable counterpart for finding workable solutions."*

Ulrike Müller, Member of the European Parliament



*"Whether it be in employment or other files, I have always found in HOTREC a reliable provider of information allowing me to better understand the particular sensitivities of the hotel -, restaurant – and pub and café sector in the European Union. Understanding yet activist, HOTREC can knock on my door any time."*

Tom Vandenkendelaere, Member of the European Parliament





2019-2024  
Let's put innovation at the core of the new EU mandate



Towards sustainable tourism in Europe



# HOTREC calls on the EU to make innovation the cornerstone of sustainable tourism



In a world of change driven by technology, in which tourist arrivals exceed 1 billion per year, the fast-evolving digital economy has made online platforms the gateway to tourism development driving growth however often in a disruptive and uncontrolled manner. With this White Paper, HOTREC calls on the EU Institutions to ensure that online platforms commit to fair and transparent B to B and B to C relations, thanks to the implementation of the Platforms to business relations' regulation and to the enforcement of the Airbnb commitments following the call from the European Commission and EU consumer authorities in July 2018.

A new thinking on subsidiarity and exerting EU competences is needed to ensure that EU action focuses primarily on truly cross-border issues, therefore making subsidiarity a must e.g. for social affairs. Furthermore, the "Think Small First principle" shall prevail in the hospitality sector, of which 1,8 million enterprises are microenterprises, making the goal of cutting red tape, and of providing the framework to Member States to foster entrepreneurship a priority in support of innovation. With this White Paper, the hospitality industry also calls on the EU Institutions to make the fight against the shortage of skills the number one priority, also promoting flexible working arrangements as a response to the specificity of the sector. Another major priority is sustainability. To follow-up with actions taken within the circular economy to reduce food waste, and to improve energy efficiency, HOTREC calls on the EU Institutions to support the industry to further develop voluntary initiatives on healthy nutrition and lifestyles. With this White Paper, HOTREC also calls on the EU Institutions to tackle overtourism and open a debate on its 5 recommendations to policy-and decision-makers.

Last but not least, ExCom calls on the EU Institutions to invest in big data to help better manage tourism flows, not to forget the necessary investments to make it the industry of the future, e. g. by developing research on artificial intelligence and blockchains.

HOTREC looks forward to working closely with the EU institutions to build a better and sustainable Europe.

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President of Horesta Denmark

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

**Samuel Lacombe**  
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**Ramón Estalella Halffter**  
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CEO of Confederación Española  
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**Václav Starek**  
ExCom member  
President of The Czech Association  
of Hotels & Restaurants (AHRCR)

**Joan Gaspart**  
ExCom observer  
Vice President of the European  
Hospitality Foundation (EHF)



# 2019-2024 EU MANDATE: 5 PRIORITIES FOR EU POLICY AND DECISION-MAKERS

A continuous partnership between the hospitality sector and the EU institutions is necessary to sustain and even boost the industry's contributions to growth and jobs in Europe. The hospitality sector alone created 1,6 million jobs between 2013 and 2016, therefore taking its workforce from 10,3 million employees in 2013 to 11,9 in 2016. HOTREC proposes 5 priorities which should constitute the basis of this new partnership to make innovation the cornerstone of sustainable tourism and of the EU action for the next 5 years.

The industry's top priority is the implementation of the policy framework initiated by the European Commission in 2018 to tackle the drawbacks of the collaborative economy and to ensure transparency and fairness in the contractual relations platforms have with hotel and restaurant businesses. This is key to make the EU's single market fit for hospitality small and microenterprises, which reached 2 million businesses in 2016. This is also a pre-requisite to foster investment and anchor innovation, while ensuring fair market conditions and a better management of tourism flows, thus contributing to sustainable tourism. In order to further meet sustainable tourism, EU action should also address the skilling of the hospitality and tourism workforce through a multistakeholder approach, based on various funding possibilities. Moreover, the EU Institutions should support the sector in its efforts to promote healthy lifestyles and nutrition through voluntary initiatives, instead of using the top down approach through regulation.

A truly innovative better regulation agenda acknowledging the fact that subsidiarity must prevail in certain circumstances is also needed. EU action is essential to tackle large cross-border issues and preserve the single market. However, common public policy challenges with limited cross-border aspects are not necessarily best tackled through pan-European legislation.

HOTREC calls on the newly elected European Parliament and European Commission to implement this public policy agenda to ensure that innovation tops the EU agenda so that to make sustainable tourism the flagship of European tourism development for the benefits of citizens.

Last but not least, and beyond the 5 priorities below, HOTREC calls on the EU to invest in big data to help manage tourism flows and to develop research on artificial intelligence and blockchains.

With this goal in mind, as for the 2014-2019 EU mandate, the EU Institutions will find a strong support from the European hospitality industry by further creating jobs and growth.

## 1- COLLABORATIVE ECONOMY – implement the actions taken by the European Commission in 2018 to allow for a responsible and sustainable tourism and go further



Work at both European and national level has to continue to ensure the level playing field of the ever increasingly professionalised 'collaborative' economy. As many 'collaborative' economy suppliers are becoming similar to micro-enterprises, policy makers have to ensure that regular / professional activities are subject to similar rules and obligations as the regulated, often micro-sized, businesses providing similar services. What is relevant for the accommodation sector is also relevant for food services (i.e meal sharing / home restaurants) - a rising issue in Europe. Several studies show that e.g. in the field of tourist accommodation the share of 'peers' offering several properties for short term rental are getting substantial. Imbalanced and insufficiently regulated markets are distorting competition in the conditions of the offer and hold back also financial resources for necessary innovation in the regulated sector. Unregulated collaborative economy also contributes to the phenomenon of 'overtourism'.

Determined policy action launched by the European Commission in the previous EU mandate needs to be continued to ensure balanced and fair European markets, safeguarding local and citizens' interests and better manage tourism flows.



To help achieve this goal, the revision of the E-Commerce Directive is a must so that peer platforms take responsibility and liability for the role they exert beyond being a simple intermediation service. Necessary measures in the public interest to be taken at national / local level should be managed by authorities to bring quick solutions through a multistakeholder approach. HOTREC will continue playing a pro-active role in the efforts to achieve a sustainable and responsible 'collaborative' economy and will be available for any exchange also in the period 2019-2024.

## 2 - BETTER REGULATION - A new thinking on subsidiarity and exerting EU competences is needed



5 years ago, the newly appointed Juncker Commission promised to be 'big on big things and small on small things'. Some concrete results were achieved through the REFIT programme and a shorter but more focused legislative agenda. Nevertheless, it is still not rare to see EU legislative proposals being made for which the 'European' added value is not evident. This is not helping the European project and also affects local businesses who are confronted with new one-size-fits all regulatory requirements, hindering also innovation.

A better Regulation agenda is therefore needed. It shall include a new thinking on subsidiarity and on how EU legislative competences are exerted to ensure that EU action primarily focuses on cross-border issues. The sectoral impact of horizontal legislation shall also be better taken into consideration and derogations be granted whenever a negative impact on local businesses which do not operate cross-border is identified. EU regulatory action should be reserved to tackle large cross-border problems.

## 3 - DIGITAL - revise the EU regulatory framework to recognise platform's liabilities and ensure a fairer and more balanced digital single market



Online platforms are playing an increasing role in the economy, with a value of the e-commerce market which reached 500 billion EUR already in 2016. Platforms' influence, role and thus responsibility have augmented enormously over the past years. Old regulations still in force, like the E-Commerce Directive dating from 2000, may not offer the proper responses to today's challenges, and new situations. Therefore, it is of crucial importance to review legislation in the light of the new market conditions and therefore enforce online platforms' liability on the markets according to their actual influence and role.

A better balance and constant monitoring of the developments around online platforms is necessary, in order to adapt to changing circumstances and to safeguard all businesses', as well as citizens' interests. With this goal in mind, HOTREC calls on the EU institutions to take action by launching the necessary review of the E-Commerce Directive to help further rebalance the market between the dominant online platforms and the millions of, especially small and micro-enterprises, in Europe, in order to provide for proper protection against unfair practices. HOTREC considers that the EU framework must be continuously adapted to market developments and properly implemented in order to take account of online platforms' liability under the changing market circumstances. Fairness in the platform economy is essential for businesses to put sufficient resources also, inter alia, into their own innovation.





#### 4 - FOOD POLICY – Foster voluntary initiatives on diet and nutrition for local food services instead of horizontal EU legislation



The well-being of its customers is at the heart of the 2 million hospitality businesses in Europe, which is composed of almost 1 million restaurants and similar establishments. With this goal in mind, the European hospitality sector supported the recent European legislation to manage the risks linked to acrylamide in food. It shows that the sector is fully taking its responsibilities when safety is at stake.

Considering the fight against obesity, one of the major current public health challenges, the sector is fully engaged at national and local level in the promotion of healthy nutrition and lifestyles through various actions and projects and will further enhance its voluntary campaigns during the next EU mandate. This was commended by Commissioner Andriukaitis who invited HOTREC to join in 2017 the EU platform for diet, physical activity and health with a commitment to present HOTREC Members' panorama of actions in favour of a healthy nutrition.

This shows that voluntary measures, as the ones which took the European hospitality industry together with the European Food Banks Federation (FEBA) to reduce food waste and develop food donations, are proving their effectiveness and therefore favourably replace European-wide legislation in this case. Indeed, hospitality businesses often produce non-standardised dishes based on local gastronomic expectations and availability of seasonal products. They are typically small local service providers regulated as such.

Therefore, in the absence of risks for the integrity of the single market, EU Institutions should foster voluntary industry initiatives instead of horizontal EU legislation which may impact local businesses.

#### 5- SOCIAL AFFAIRS - Skills: Make the fight against skills shortage a truly EU case



Despite the fact of representing 2 million businesses, 90% of which are micro-enterprises, and 11.9 million jobs, the hospitality sector strives to attract and retain workers. Technological changes have created new needs for digital skills to respond to customers' demands and to be more visible online. Societal change also drives new demands, for instance in food services, where qualified chefs are missing. In fact, while the average job vacancy rate is of 1.7% in the EU, in the accommodation and food service sector, it reaches 3% in Belgium, 4.4% in Germany, 7.4% in Greece.

A strong EU policy should be set-up to help the tourism industry to innovate, attract, train and retain the workforce. Solutions pass through EU funding able to finance massive trainings (e.g. on digital, interpersonal skills, languages); the promotion of quality, cost-effective and attractive apprenticeship schemes and vocational education and training (VET); advertising existing tools (e.g. European Hospitality Skills Passport, which enables employers and job seekers match on the labour market); facilitating the transition from education to work to meet the labour market demand; anticipating and detecting emerging skills needs. At the same time, the EU should secure the possibility of using flexible working arrangements, to help the industry face the challenge of seasonality and the fact that customers expect hospitality business to be open outside normal working time, week-ends included. All in all, the EU Institutions should support the launch of multistakeholder campaigns to improve the image of the hospitality and tourism sectors.





# ACCESS THE HOTREC MEMBERSHIP

For more information at European level, please contact Mr. Christian de Barrin, CEO of HOTREC.

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For more information at national level, please contact the relevant HOTREC Member – see full list below.

## FULL MEMBERS

### AUSTRIA

APHA-Fachverband Hotellerie  
[www.hotelverband.at](http://www.hotelverband.at)  
President: Susanne Kraus-Winkler  
CEO: Mag. Matthias Koch

APRA-Fachverband Gastronomie  
[www.gastronomieverband.at](http://www.gastronomieverband.at)  
President: Mario Pulker  
CEO: Dr. Thomas Wolf

### BELGIUM

Fed. Ho.Re.Ca. Bruxelles-Brussel  
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President: Yvan Roque

HORECA Vlaanderen  
[www.horecavlaanderen.be](http://www.horecavlaanderen.be)  
President: Filip Vanheusden  
CEO: Matthias De Caluwe

Fédération HoReCa Wallonie  
[www.horecawallonie.be](http://www.horecawallonie.be)  
President: Thierry Neyens  
Secretary General: Pierre Poriau

### CROATIA

UPUHH-Association of Employers in Croatian Hospitality  
[www.upuhh.hr](http://www.upuhh.hr)  
President: Ivan Sabljic  
CEO: Dr.sc. Iva Bahunek

### THE CZECH REPUBLIC

AHRCR-The Czech Association of Hotels and Restaurants  
[www.ahrcr.cz](http://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](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: Maarika Liivamägi

### FINLAND

FHA-Finnish Hospitality Association  
[www.mara.fi](http://www.mara.fi)  
President: Tomi Lantto  
CEO: Timo Lappi

### FRANCE

GNC-Groupement National des Chaînes  
[www.umih.fr](http://www.umih.fr)  
Président: Jean-Virgile Crance  
Vice-President: Samuel Lacombe

GNI - Groupement National des Indépendants Hôteliers et Restauration  
[www.synhorcat.com](http://www.synhorcat.com)  
President: Didier Chenet  
Advisor to the President, Director Public Policy & Communication: Franck Trouet

UMIH-Union des Métiers et des Industries de l'Hôtellerie  
[www.umih.fr](http://www.umih.fr)  
President: Roland Heguy  
Director General: Philippe Delterme

### GERMANY

DEHOGA-Deutscher Hotel-und Gaststättenverband  
[www.dehoga.de](http://www.dehoga.de)  
President: Guido Zöllick  
CEO: Ingrid Hartges

IHA-Hotelverband Deutschland  
[www.hotellerie.de](http://www.hotellerie.de)  
President: Otto Lindner  
CEO: Markus Luthe

### GREECE

HCH-Hellenic Chamber of Hotels  
[www.grhotels.gr](http://www.grhotels.gr)  
President: Alexandros Vassilikos  
CEO: Dr. Agni Christidou

### HUNGARY

HHRA-Hungarian Hotel and Restaurant Association  
[www.hah.hu](http://www.hah.hu)  
President: Tamás Flesch  
Secretary General: Zsófia Deák

### IRELAND

IHF-Irish Hotels Federation  
[www.ihf.ie](http://www.ihf.ie)  
President: Michael Lennon  
Chief Executive: Tim Fenn

RAI-Restaurants Association of Ireland  
[www.rai.ie](http://www.rai.ie)  
President: Liam Edwards  
Chief Executive: Adrian Cummins

### ITALY

FEDERALBERGHI-Federazione delle Associazioni Italiane Alberghi e Turismo  
[www.federalbergchi.it](http://www.federalbergchi.it)  
President: Bernabò Bocca  
Director General: Alessandro Massimo Nucara



FIPE-Federazione Italiana Pubblici Esercizi

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

President: Dott. Lino Enrico Stoppani  
Director General: Roberto Calugi

#### LATVIA

AHRL-Association of Latvian Hotels and Restaurants

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

President : Janis Valodze  
Acting President: Jannis Pinnis  
CEO: Mag. Santa Graikste

#### LITHUANIA

LHRA-Lithuanian Hotel and Restaurant Association

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

President : Evalda Siskauskiene  
Managing Director: Egle Lizaityte

#### LUXEMBOURG

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

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

President : Alain Rix  
Secretary General : François Koepf

#### MALTA

MHRA-Malta Hotels and Restaurants Association

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

President: Tony Zahra  
CEO: Andrew Agius Muscat

#### THE NETHERLANDS

KHN-Dutch Hotel, Restaurant and Café Association

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

Chairman of the Board: Robèr Willemsen  
General Director : Rob Bongenaar

#### POLAND

IGHP- Chamber of Commerce of the Polish Hotel Industry

[www.ighp.pl](http://www.ighp.pl)

President: Ireneusz Węglowski  
Secretary General: Marcin Mączyński

ZPHoReCa-Association of Employers HoReCa

<http://www.zphoreca.pl>

President & CEO: Marcin Zawadzki

#### SLOVAKIA

AHRS - The Slovak Association of Hotels and Restaurants

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

President: Tomáš Ondrůka  
Secretary General: Marek Harbuřák

#### SLOVENIA

TGZ-Tourism and Hospitality Chamber of Slovenia

[www.tgzs.si](http://www.tgzs.si)

President: Andrej Prebil  
Director: Klavdija Štalcer  
President of Slovenian Hotel Managers Association: Gregor Jamnik

#### SPAIN

CEHAT-Confederación Española de Hoteles y Alojamientos Turísticos

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

President : Juan Molas  
Secretary General: Ramón Estalella

Gremi d'Hotels de Barcelona

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

President: Jordi Clos Llombart  
Secretary General: Manel Casals

#### SWEDEN

VISITA-Swedish Hospitality Industry

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

President: Maud Olofsson  
CEO: Jonas Siljhammar

## ASSOCIATE MEMBERS

#### ICELAND

SAF-Icelandic Travel Industry Association

[www.saf.is/en/](http://www.saf.is/en/)

President: Grímur Sæmundsen  
CEO: Jóhannes Þór Skúlason

#### LIECHTENSTEIN

LHGVLiechtensteiner Hotel & Gastronomieverband

[www.lhgv.li](http://www.lhgv.li)

CEO: Dr. Walter Hagen

#### NORWAY

NHO Reiseliv-Norwegian Hospitality Association

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

President: Ole Warberg  
CEO: Kristin Krohn Devold

## OBSERVERS

#### GEORGIA

HOREKA-Georgian Hotel Restaurant Café Federation

[www.horeka.ge](http://www.horeka.ge)

President: Ketevan Meladze

#### SWITZERLAND

GASTROSUISSE-Verband für Hotellerie und Restauration

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

President: Casimir Platzer  
CEO: Daniel Borner

HOTELLERIESUISSE-Swiss Hotel Association

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

President: Andreas Züllig  
CEO: Claude Meier

#### TURKEY

TUROB-Hotel Association of Turkey

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

President: Timur Bayindir  
General Manager: İsmail Taşdemir

TTYD - Turkish Tourism Investors' Association

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

Chair of the Board: Oya Narin  
Secretary General: Fatih Tokatli

#### THE UNITED KINGDOM

UKHospitality

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

Chairman: Steve Richards  
CEO: Kate Nicholls



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