



ANNUAL REPORT 2017 | 2018

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MISSION

HOTREC is the umbrella Association of Hotels, Restaurants and Cafes and similar establishments in Europe, which brings together 43 Associations active in 30 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.



Visit our new website: www.hotrec.eu !

FOREWORD BY MR. ANTONIO TAJANI, PRESIDENT OF THE EUROPEAN PARLIAMENT

Dear readers,

I am pleased to have the opportunity to address you in this foreword to the HOTREC 2017/2018 Annual Report.

Tourism is a very important sector, because it is a way to transmit our immense cultural heritage. Our continent is the world's crown jewel, with its unique historical, cultural and creative heritage, landscape and nature. Over the next 10 years, tourism can create more than 5 million new jobs, not least because the number of tourists is set to double to more than 2 billion. Europe must not let this opportunity pass by. Through the growth of tourism, we can offer real prospects for the new generations and boost strategic sectors of the economy, such as transport, trade, luxury goods, shipbuilding, construction, agri-foodstuffs and the cultural and creative industries.

I am convinced that we need a comprehensive European strategy to enhance the competitiveness of the industry vis-à-vis the international market. Such a strategy would put the EU budget at the service of this critical economic sector. For Europe to play its role in full, we need a specific heading on Tourism in the upcoming multiannual budget. This can be the basis of pan-European projects exploiting the European synergies on tourism.

European synergies could channel more investment on innovation to renew and innovate facilities and destinations. We need to invest not only in infrastructures but also in people, which remain the most important asset of this industry. We need to step up training facilities to be commensurate with the needs of the market. The industry is having difficulties finding the right skills, which can be as varied as one can imagine. Targeted and constantly updated vocational training is therefore vital to the competitiveness of the industry and to its ability to create new jobs.

We need to manage the digital revolution for this to translate into a fair change for all society. Digital progress has to work also for the hoteliers and the restaurateurs and not only for the big multinational web-based companies.

Finally, we must see that the strength of the European Union works also for this sector, including by promoting Europe as a destination in the world.

We cannot just wait for this to happen by itself. We must work to improve our competitiveness and our skills, to face the challenges of digitalisation and to promote Europe as the world's number one tourist destination. I therefore fully support the European hospitality and tourism sector, and highlight the good cooperation with HOTREC, as one of the main representatives of the EU tourism industry, for the role played in shaping the future of European tourism to the best interest of its businesses.

Antonio Tajani



"I fully support the European hospitality and tourism sector, and highlight the good cooperation with HOTREC [...] for the role played in shaping the future of European tourism to the best interest of its businesses."

FOREWORD BY MS. ELŻBIETA BIEŃKOWSKA, COMMISSIONER FOR INTERNAL MARKET, INDUSTRY, ENTREPRENEURSHIP AND SMES



Dear readers,

Last year, I outlined a set of challenges for the tourism sector and what the European Commission is doing to support the industry. It is now time to update you on the developments in our actions for the European tourism sector.

This year we are celebrating the EU-China Tourism Year and the European Year of Cultural Heritage. We have put together a rich programme to showcase Europe's unique natural and cultural assets and diverse and creative tourism offers.

These initiatives provide a unique opportunity to increase the number of visits, promote sustainable and cultural tourism and open up new business opportunities for European tourism.

Innovation and new technologies are having a profound impact on the competitiveness of the European tourism industry, especially on SMEs. We have been active on different fronts to help European tourism overcome these challenges.

Firstly, in the context of the New Skills Agenda and its Blueprint for Sectorial Cooperation, we have stepped up our efforts to identify and close the skills gap and to improve the perception of careers in the tourism sector. We have mobilised EU funds to set up a dedicated cooperation platform which will define the skills and job profiles the tourism industry needs. It will also propose an action plan to roll out those skills at national and regional level. This will help the industry find and retain professionals with the right competence.

Secondly, we are supporting small and micro tourism enterprises to adapt to technological trends. For instance, we have enriched the Tourism Business Portal with new tailor-made webinars on digital and online marketing skills for tourism entrepreneurs. In addition, from this autumn onwards we will organise a number of seminars on digital skills across the European Union.

Thirdly, innovation is also driven by social trends and new business models. This has a distinct impact on tourism businesses and on local communities. The Commission is looking at how we can encourage the development of new and innovative services, and the temporary use of assets, while ensuring adequate consumer and social protection. Last year we held a series of workshops on the collaborative economy in the tourism accommodation sector. We discussed the application of EU legislation to new business models with a broad range of stakeholders and exchanged views on regulatory practices. It has been an open and interactive process that has revealed a lot of information about practices on the ground.

Lastly, tourism is an industry rooted in a destination. Enabling regions to cooperate and boosting investment to support innovation and SMEs is therefore crucial. We are working to ensure complementarity between the different EU funding resources and tailor-made support under the COSME Programme. I am particularly happy that the European regions seized the opportunity offered by the Smart Specialisation Platform for Industrial Modernisation and are now working together to promote smart and sustainable tourism.

Our work reflects the complexity of the tourism value chain. In fact, our Renewed Industrial Policy Strategy, published last September, provides a flexible framework for addressing this complexity through focusing on investment, skills, innovation and digitisation, the circular economy and internationalisation of SMEs. We must work together to make the most out of this new strategic approach for the benefit of European destinations and the tourism industry.

Your role as industry representatives is very important in leading European tourism in the 21st century and the Commission is ready to work with you to turn the challenges into opportunities.

MESSAGE FROM MR. ZURAB POLOLIKASHVILI, SECRETARY GENERAL OF THE WORLD TOURISM ORGANIZATION



"I thank HOTREC for its continuous commitment to advancing knowledge on sustainable development in the hospitality industry and beyond, including through several important projects with UNWTO."

International travel continues to grow strongly, consolidating tourism as a key driver in socio-economic development. In 2017, international tourist arrivals grew by a remarkable, and record-breaking, 7% to reach a total of 1,320 million. 2017 was the eighth consecutive year of above-average growth in people crossing borders for tourism, bringing immense benefits to countries, communities and societies.

For such a large and rather mature region, Europe recorded extraordinary results in 2017. Led by Mediterranean destinations, the continent received 8% more international arrivals than in 2016. Across the 28 countries of the European Union (EU) international tourist arrivals reached 538 million, a growth of 7.5% over 2016, in line with that of the region as a whole.

The continued growth of tourism across Europe translates into more jobs, competitive economies and better lives for its citizens. As tourism growth continues, a stronger and more integrated Europe is needed to promote a higher level of regional cooperation; incentivize education, innovation and entrepreneurship; better facilitate visas; invest in the digitalization in tourism; adapt to new market changes; and place sustainability at the core of tourism development in line with the universal Sustainable Development Goals (SDGs).

Working together we can grow more sustainably as a sector, which is why UNWTO is pleased to have a longstanding relationship with HOTREC. I thank HOTREC for its continuous commitment to advancing knowledge on sustainable development in the hospitality industry and beyond, including through several important projects with UNWTO.

One of these projects has been to exchange knowledge and experience on the new platform tourism services (the so-called sharing economy). One of the great challenges facing our sector is to bring tourism policies in line with these market changes.

With strong partnerships and by adapting correctly, we can address these challenges and increase the quality, sustainability and competitiveness of the tourism sector. UNWTO will continue to work with HOTREC to lead the sustainable development at this pivotal time of change.

We welcome HOTREC's Annual Report and its overview of European hospitality and trust it will help all readers better understand the value of hospitality for tourism in Europe.

MESSAGE FROM HOTREC PRESIDENT AND FROM HOTREC CEO



HOTREC led successful advocacy and lobbying activities to sustain investment in the hospitality sector and help build a better and sustainable Europe.

The past twelve months paved the way to a brighter future for the hospitality industry, thanks to the successful advocacy and lobbying activities that HOTREC led with its Members to sustain investment in the sector and help build a better and sustainable Europe. As regard to the digital agenda, the recent European Commission legislative proposals on Fairness in Platform-to-Business Relations and on a New Deal for Consumers shall re-equilibrate the market which currently runs to the detriment of enterprises and consumers. To support this, HOTREC unveiled the results of its 3rd distribution study, which highlight the increasing dependency of hotels vis a vis online travel agent.

HOTREC's efforts also focused on keeping VAT rates low for hospitality businesses to foster job creation and competitiveness in the European Union. With regard to food policy, the new Commission Regulation on acrylamide in food topped HOTREC's agenda to achieve a workable plan for the 1.5 million restaurants and cafes located in Europe allowing to meet significant public health objectives.

Sustainability has also topped HOTREC's agenda following its 2017 report on the reduction of food waste and its upcoming one to help businesses improve energy efficiency and reduce their environmental footprint.

Last but not least, the European Pillar of Social Rights led the industry to raise policy and decision-makers' awareness on its specificities so that to achieve flexibility to respond to the shortage of skills and keep the subsidiarity principle.

Finally, HOTREC welcomed three new members: ZPHoReCa from Poland, Gremi d'Hotels de Barcelona from Spain and HOREKA from Georgia, which brings HOTREC's Membership to 43 national associations established in 30 European countries.

Besides these, HOTREC is also anticipating the 2019 European elections with the preparation of a White Paper, considering the many challenges ahead for micro and small enterprises. This policy document will aim at putting better regulation at the core of the EU agenda to make tourism an even more competitive and successful industry in support of the EU economy.

We would like to thank HOTREC Members for their ongoing support and funding and we look forward to even further developing our partnership with the EU Institutions.

A handwritten signature in blue ink, appearing to read 'Susanne Kraus-Winkler'.

Susanne Kraus-Winkler
President

A handwritten signature in blue ink, appearing to read 'Christian de Barrin'.

Christian de Barrin
Chief Executive Officer

CORE POLICY ACHIEVEMENTS AND ACTIVITIES



HOTREC constantly strives to develop services to its Members that achieve measurable results for the benefit of the industry in Europe and on a broader scale to society. With this goal in mind, HOTREC conducted numerous studies and activities and successfully reached a large number of policy achievements in 2017/2018.

Influencing EU discussions to keep VAT low and to tax online platforms

Taxation is a crucial aspect of the competitiveness of the hospitality sector on the world tourism market. Over the last 12 months, HOTREC actively contributed to the EU discussions on the revision of the VAT Directive and in the taxation of the digital economy.

New Commission proposal gives green light to continuous application of reduced VAT rates in tourism

As the Commission announced its intention to amend the rules on the application of reduced VAT rates, of which benefits the hospitality sector, HOTREC and its Members put forward strong arguments to keep VAT rates for hospitality services low, given these rates importance for job creation and competitiveness on the global market. For instance, HOTREC actively contributed to the Commission's preparatory work with the publication of a report showing benefits of a low VAT rate application on job creation and competitiveness in the European hospitality sector.

This helped paving the way for the Commission to propose in January 2018 an amendment of the VAT Directive which allows for more flexibility for EU Member States to apply reduced rates of VAT, thus allowing to keep such low rates for hospitality services in Europe. HOTREC is confident, that once the new Directive will be adopted, Member States will keep the possibility to apply low VAT rates to tourism services, therefore helping Europe remaining the N°1 tourism destination in the world.

Contributing to making a fair taxation of the digital economy a reality

In today's digitalised economy, the tax returns deriving from large online platforms activities on European ground do not live up to the value and revenues on transactions operated in the European Union (e.g. AirBnB paid only 93.000 EUR on tax to the French treasury in 2016, while France is one of its biggest markets in Europe). During the preparatory phase of the legislative proposal tackling this issue, HOTREC reached-out to the European Commission clearly stressing that such loose tax regimes are also hindering innovation and competition on the online platform market and thus contributing to oligopolistic situations and preventing innovative start-ups to emerge. This advocacy work contributed to the European Commission legislative proposals of March 2018, suggesting, that online platforms pay taxes based on the value created in the country of operation.

Beyond the fair taxation of the activities of the platforms themselves, HOTREC continued its efforts regarding the proper taxation of the underlying activities offered through collaborative economy platforms.

HOTREC actively advocated for keeping low VAT rates in order to foster job creation and competitiveness, as well as for the taxation of online platforms activities.



Platforms' unfair business practices getting finally under heavy pressure

HOTREC is leading the fight to secure a fair online platform market environment for businesses and consumers through regular policy activities. Indeed, as a result of HOTREC's active contribution to the European Commission's fact finding exercise in mapping and identifying unfair practices in platform to business relations, the European Commission unveiled on April 26 a proposal for a regulation, on promoting fairness and transparency for business users of online intermediation services and online search engines in the Digital Single Market.

Bringing more balance in platform to business relations through a new Regulation

Currently, the majority of hoteliers across Europe consider that they would not accept voluntarily the terms and conditions, as proposed by 1-2 platforms that dominate the online intermediary hotel booking market. Furthermore, a huge share of hoteliers considers, that platforms do not offer fair and effective procedures, when it comes to settling disputes.

Following the groundwork HOTREC has invested over the past months, the European Commission made on 26 April 2018 a legislative proposal that allows for more balanced markets. Improvements regarding transparency of terms and conditions, of rankings' criteria, as well as settlement of disputes are all aspects, where HOTREC expects improvements. There is a great chance for settling current market imbalances and to stop the situation where European businesses are at the mercy of big platforms.

More fairness and transparency for business users of online platforms shall also release business resources for innovation, further improvement and development of the own products and services, instead of tackling unfair practices, thus increasing the EU's and European hospitality businesses' competitiveness. HOTREC is making its utmost to ensure that this Commission proposal is adopted as soon as possible, in order to let the new binding rules deploy their positive effects for businesses.

Making European tourism parity clause free

Another sign for tourism and especially hotel businesses regaining some of their entrepreneurial freedom is the development around parity clauses. In August 2017, Italy decided to ban parity clauses from contracts between hotels and Online Travel Agencies, while the previously adopted ban in Austria was reinforced by a decision from the country's constitutional court. Thus, by today, basically half of the European tourism market (in terms of overnight stays) benefits already from the freedom of setting its own conditions for potential guests with bans effective in Germany, France, Austria and Italy. Further countries are already in the line.

Actions developed by HOTREC and its Member Associations clearly help hospitality businesses restoring their entrepreneurial freedom and diminish platform's powers to dictate market access conditions.



More fairness and transparency in platform operations will also release resources for investments in making the European tourism market even more competitive.

'Collaborative' economy steadily integrated in 'real' economy

'Collaborative' or 'Sharing' economy activities are about to lose their often falsely perceived perception of a new type of economy based on altruism and full of societal benefits. More and more it becomes clear that, everywhere, where business can be made, business will be made.

Over the past years, HOTREC followed very closely the developments around the so-called 'collaborative' economy, and has put forward concrete proposals for bringing more balance in newly developed markets, where actors are playing the same game, but according to different rules.

HOTREC recommendations are shared by an increasing number of public authorities and are being implemented

In 2017, HOTREC policy paper and its 5 key pillars for a responsible collaborative economy were broadly listened to and quoted by different stakeholders in various EU discussions, as the growing business characteristics behind this 'new' economy is more and more recognised. Moreover, two studies from the European Commission confirmed HOTREC's message to EU policy makers that multi-property owners and regular renting of properties are representing a non-negligible share of the market. As the professionalisation of the 'collaborative' economy is steadily ongoing, HOTREC's recommendations (e.g. registration of the activities and fair taxation) are being mirrored in the regulatory developments of an increasing number of local/regional or national authorities, thanks to the active interventions of HOTREC's Member Associations.

Tackling a new facet of the 'collaborative' economy: the growing number of private home restaurants

HOTREC and its Members are also increasingly confronted with the growing phenomenon in many cities across Europe, where private individuals organise private home-restaurants, often 'sharing' a dinner against a substantial price. European restaurant businesses, which have to follow strict food safety and hygiene rules in order to ensure the health of guests and also to comply with fiscal obligations, are more and more facing unfair competition by these new food business operators which often work in the grey area.

In order to get a picture of the market and to put forward recommendations to policy makers, HOTREC has been developing a publication about the 'meal-sharing' market, and a way forward to level the playing field with the food sector. This document shall help HOTREC Members as well as policy makers having a better awareness of the developments around the continuously expanding home-restaurants. Thus, besides tackling the challenges presented by short term accommodation rentals, HOTREC is also bringing clarity and fairness to both businesses and consumers on the ever increasing market around 'meal-sharing'.



Policy makers start bringing so-called 'collaborative' type of business activities on a similar footage with regular business activities, as advocated by HOTREC.

Achieving transparency and fairness of online platforms for the benefits of consumers



Digitalisation radically transformed the tourism market by opening-it-up to new powerful market players, making an update of existing EU consumer legislation a must. As a result, the European Commission launched a targeted revision of the EU consumer framework, to which HOTREC actively participated by promoting a revised framework which adequately protects consumers, while allowing tourism and hospitality businesses to flourish.

Bringing transparency to the online tourism market across Europe

The exponential development and oligopolistic online tourism market, e.g. for collaborative type of activities, has resulted in a lack of transparency about the real identity of the actual provider of a tourism service. It creates major uncertainties for consumers, as it is unclear whether they are protected by consumer laws or not when using those platforms. Moreover, it leads to a distortion of competition with hospitality businesses, as some traders often use this lack of transparency to avoid the legal obligations applicable to tourism and food services. Moreover, while paid-for-rankings have become a major driver on online markets, consumers must assume that these are natural search results as no clear information is provided.

To address the issue, HOTREC has been advocating for a revised consumer legislation which would:

- Equally apply to all tourism services, whoever the identity of the actual service provider;
- Make it mandatory for platforms to indicate whether the provider of a service is a trader or not and whether a transaction is subject to consumer laws or not;
- Raise transparency of rankings in online search results.

Advocating for a legislation which eliminates red-tape and stimulates innovation

HOTREC is also promoting a revision of the EU consumer acquis which would eliminate red-tape, while offering a favourable environment for innovation in the sector. In order to achieve this, HOTREC advocated for a simplification of the information requirements at the advertising stage. HOTREC also cautioned against the extension of the consumer law provisions on the right of withdrawal to free digital services when part of a main tourism accommodation service.

In close liaison with the European Commission and European Parliament, HOTREC is actively contributing to making the revision of the EU Consumer law acquis a great opportunity to better protect consumers, boost their confidence in tourism services and set-aside unnecessary regulatory obstacles to innovation in the sector.

HOTREC is contributing to making the revision of the EU Consumer law acquis a great opportunity to better protect consumers, and make the digital tourism market more transparent and therefore more competitive.

Support small and micro-enterprises to implement GDPR

From 25 May 2018 onwards, all companies processing personal data have to apply the General Data Protection Regulation (Regulation (EU) 2016/679). Following its strong lobbying campaign between 2013 and 2015, HOTREC released during 2017 specific guidelines for hotels, restaurants and HOTREC National Associations.

Helping hospitality businesses meeting their legal requirements while calling Member States to allow flexibility to implement GDPR and not to apply fines to small and medium-sized enterprises

Within the guidelines, the following points were highlighted, according to HOTREC's interpretation of the Regulation:

- All companies have to comply with the basic principles of the Regulation, namely: fair, lawful and transparent data processing; the purpose limitation principle (data can only be processed for legitimate and specific purposes); data minimisation (data needs to be limited to what is necessary); accuracy (data needs to be up to date); data retention period (data can be processed for no longer than necessary); data security; accountability;
- The Data Protection Officer is not compulsory in hospitality enterprises, as the hospitality sector's core business is not data processing but the provision of a hospitality service to a client;
- Impact assessments and prior consultations are, on a general basis not needed in the hospitality sector, as they do not constitute a high risk for the rights and freedoms of the individuals;
- Hotels, restaurants and bars are not obliged to delete completely data from former clients (e.g. for direct marketing purposes), if they are processing data on a legitimate interest.

Along with its support to its 1.9 million small and medium-sized enterprises, 90% of which being micro-enterprises, HOTREC together with UEAPME have been calling Member States to show flexibility in enforcement and not to apply fines during a period of one year.

Contributing to a homogeneous interpretation while minimising costs for SMEs

By delivering sectoral guidelines, HOTREC was able to support companies to comply with the legislation and avoid unnecessary administrative burdens. HOTREC also recommended to its Members to show these guidelines to their respective Data Protection supervisory authorities at national level, and explain the arguments behind HOTREC's interpretation of the Regulation. This shall help achieving a more homogeneous interpretation at national level when implemented by the hospitality sector, while minimising compliance costs for businesses.



HOTREC activities shall help achieving a more homogeneous interpretation of the Regulation, which will minimise compliance costs, while asking Member States for flexibility in enforcement during one year without any fine for SMEs.

Working for a European Pillar of Social Rights that fits SMEs' realities



HOTREC pro-actively engages with EU policy makers to minimise costs and red tape while delivering on work-life balance.

The proclaimed European Pillar of Social Rights launched in November 2017, sets out 20 key principles focusing on equal opportunities, fair working conditions, social protection and inclusion. While supporting these objectives, HOTREC has actively engaged with EU institutions to make sure that the upcoming legislative measures encapsulate the specificities of the hospitality sector, which is composed at 90% by micro-enterprises; and that above all, wherever possible, subsidiarity prevails.

Better work-life balance for families, with minimum costs for micro-enterprises!

Work-life balance and gender inequality are two major issues that need to be appropriately addressed to be workable in the context of micro-enterprises, and in particular of the specificities of the hospitality sector.

Extra leaves (e.g. paternity, parental, carer's) and unilateral flexible working arrangements constitute a huge challenge for the close to 1.7 million micro-enterprises composing the European hospitality industry, because of the current skills shortage and the additional training and replacement costs they entail.

Therefore, HOTREC pro-actively engaged with the EU institutions and made proposals to take into account the specific situation of micro-enterprises and therefore to minimise costs, while still delivering on work-life balance.

HOTREC also met with all relevant stakeholders, EU officials and Members of the European Parliament to find workable solutions for both employees and employers. This willingness was broadly welcomed by the EU institutions.

Transparent and predictable working conditions are welcome – however red tape and costs shall be strongly restricted (limited)!

HOTREC is a strong believer that information on working conditions is key for good work deployment. However, the unpredictability of the workload in the sector (e.g. organisation of a buffet for a last-minute event), seasonality and the unique work environment (open 24 hrs a day / 7 days a week) make that many hospitality businesses have no other choice than using casual workers.

Therefore, flexibility must prevail, and red-tape cut in their everyday work organisation. With this goal in mind, HOTREC advocated for applying an exception regime that would allow certain employees not to receive a Written Statement in specific situations.

HOTREC also advocated for the transition from a temporary contract to a permanent contract to be at the employer's initiative and also for the sector not to provide all employees with the right of minimum predictability of work.

Thanks to its information and advocacy campaign, HOTREC and its Members' key industry messages were heard. This should help achieving a favourable outcome for the hospitality sector.

Driving thought-leadership while taking responsibility for food policy



HOTREC coordinates the many efforts led by its Members to meet public health objectives, while sustaining the sector's benefits to society.

Food is a key aspect of any hospitality business' activities. Therefore, HOTREC has always acted both as a pragmatic and responsible player in matter of EU food policy, therefore helping achieving important public policy goals such as a food safety and public health, also including the reduction of food waste.

Sharing Members' knowledge and best practice to foster healthy nutrition

In 2017, HOTREC joined the EU platform for action on diet, physical activity and health, with a twofold commitment:

- Share with its Members the best-practices developed by platform members which are relevant to help the hospitality sector stepping-up its activities in favour of a balanced diet and the fight against obesity;
- Make available a yearly panorama of the actions undertaken by its Members which contribute to achieve a healthier nutrition.

With this pledge, HOTREC shows the sector's engagement through promoting the development of pragmatic and responsible actions that benefit both consumers and hospitality businesses alike.

Taking responsibility in reducing food waste

While being a small food waster (12% of the total food waste are generated by hospitality, canteens and catering businesses all together), the hospitality industry has been engaging in the reduction of food waste for many years. This excellent track-record allowed HOTREC to convince EU policy makers to set-up in the newly adopted (18 April 2018) revision of the waste framework Directive flexible aspirational food waste reduction targets, instead of one-size-fits-all binding targets. This shall allow hospitality businesses to further reduce food waste, while avoiding red-tape.

Promoting responsible and pragmatic policy solutions tackling trans-fats.

The European Commission's recent inceptive impact assessment on trans-fats (TFAs) showed that, overall TFAs intakes remain a source of public health concerns in some population groups, leading to several diseases. The Commission is therefore considering a policy initiative to tackle the issue. Taking into account this legitimate public health concern, and that the specificity of the hospitality sector is mostly composed of micro-enterprises producing meals from fresh products, HOTREC decided to advocate for a pragmatic and ambitious EU policy initiative. As TFAs can naturally be present in some typical ingredients of the European diet (e.g. ruminants) and that industrial TFAs are mostly present in sophisticated food prepared by the processing industry, HOTREC advocated in favour of a policy initiative focusing exclusively on industrial TFAs and setting a maximum limit to the industrial TFA content in food. HOTREC also warned against mandatory sampling/analysis in the hospitality sector, since the sector does not produce much TFAs. This responsible stance, if followed by EU institutions, would result in a policy initiative that tackle the prime source of industrial trans-fats in all dishes consumed by citizens, without unnecessarily burdening the restaurant sector and its numerous micro-enterprises.

Advocating for a simple and secure Visa Policy

HOTREC, together with NET, the Network for the European Private Sector in Tourism, have been promoting a simple and safe visa policy in Europe which secures freedom of movement. To achieve this goal, HOTREC and NET developed an intensive advocacy campaign on the revision of the Visa Code and on ETIAS (European Travel Information and Authorisation System).

Simplicity of procedures and security of Schengen space: the values to be introduced in the new revision of the Visa Code

As the European Commission was considering proposing a Visa policy reform, HOTREC and NET jointly deployed advocacy activities at EU level, in particular with the European Commission, through a joint consultation reply and a joint position co-signed by all relevant tourism stakeholders.

This campaign was advocating for the inclusion in the upcoming proposal of key aspects to boost the competitiveness of the EU as a tourism destinations, such as:

- Reducing processing times;
- Simplifying supporting documents;
- Possibility of issuing multiple entry visas;
- Possibility of applying online for a visa;
- Cooperation with external service providers.

Thanks to HOTREC's pro-active engagement, the European Commission was well aware of the hospitality and tourism sector's priorities when making its proposal for the visa reform of 14 March 2018.

An efficient, simple, inexpensive European Travel Information and Authorisation System (ETIAS)

HOTREC and NET also called on the EU institutions to implement an efficient, simple, inexpensive and proportionate travel authorisation system, which would not deter potential bona-fide travellers to come to Europe. Thanks to HOTREC and NET's sharp lobbying campaign, the ETIAS application will finally remain cheap (7 euros per visa fee, with a visa fee waiver for under 18 year and above 70 years old), flexible (applications can be made online), and proportionate (the travel authorisation will be valid for three years).

This outcome represents a victory for HOTREC and the tourism industry, as a good balance between security and removal of red tape was achieved.



HOTREC is campaigning for a new VISA Code that would reduce administrative proceedings for legitimate travellers visiting Europe.

CORE EVENTS

During the past 12 months, HOTREC organised high-level events aimed at promoting the hospitality industry's key messages towards European policy and decision-makers and at facilitating debates.

HOTREC MEP Breakfast in the European Parliament on transparency of online platforms

On 10 October 2017, HOTREC organised a policy breakfast in the European Parliament on the role of online platforms in making the digital single market fair and transparent to boost jobs and growth in the tourism sector. The event, kindly hosted by MEP Isabella de Monte, gathered High Level speakers from the EU institutions and European stakeholder organisations, therefore allowing for a fruitful exchange of views.

HOTREC pointed at a number of practices from major online platforms which undermine transparency and trust in the online tourism market, as well as competition.

The Commission's views were presented by Ms. Veronica Manfredi and by Mr. Werner Stengg (respectively Heads of Units at the European Commission's DG Justice and DG Connect), who have both worked on the new EU legislative proposals which aim at increasing transparency and fairness in online platform environments, both in B2C and B2B relations. MEP Anneleen van Bossuyt, Chair of the European Parliament's IMCO Committee, and Mr. Guillermo Beltra from the European consumer organisation BEUC also expressed their concerns regarding the untransparent operation of platforms. ETTSA, the trade association representing platforms in the travel industry, failed to bring answers to the many concerns raised by HOTREC and the participants.

The concluding remarks highlighted the need for stepping up actions at EU level to better regulate online platforms operations in order to benefit both consumers and businesses.

HOTREC workshop to address Hospitality and Security

On 21 March 2018, HOTREC organised a workshop on Hospitality and Security kindly coordinated by Mr. Paul Moxness, Senior Vice-President, Safety & Security, Radisson Hotel Group, in order to raise Members appreciation on the current state of play of tourism and security in the UNTWO, the European Commission, and also the OSAC (Overseas Security Advisory Council, U.S. Department of State). The event provided HOTREC Members with the opportunity to discuss with a team of 6 recognised experts in the field: Mr. Dirk Glaesser, Director, Sustainable Tourism for Development, UNTWO, Mr. Andrea Volkmer, Policy Officer, Counter-terrorism, European Commission, Mr. Jonathan Dunbar, EMEA Director, Sibylline, Mr. Paul Moxness, Mr. James Gooding, Director of Global Intelligence, InterContinental Hotel Group and Mr. Dominique Couppé, Security Director, Louvre Hotel Group.

First step taken by HOTREC will be the development of a library of publicly available resources for its Members.



MEP Breakfast on online platforms, 10 October 2017, European Parliament

"There should be a level-playing field for all actors in today's digital economy and more transparency both towards businesses and of course consumers."

MEP Isabella De Monte, 10 October 2017, HOTREC policy breakfast in the European Parliament



HOTREC workshop on Hospitality and Security, 21 March 2018, Brussels

"Meeting our duty of care"



A policy dialogue with three leading Belgian Members of the European Parliament, during HOTREC Antwerp GA

During its 75th General Assembly in Antwerp (19-20 October 2017) organised thanks to HORECA Vlaanderen, HOTREC engaged a policy dialogue with three leading Members of the European Parliament: MEP Anneleen Van Bossuyt, Chair of the Internal Market & Consumer Protection committee, MEP Tom Vandenkendelaere, Member of the Economic & Monetary Affairs and Employment & Social Affairs committees, and MEP Sander Loones, who sits in the Economic & Monetary Affairs and Civil Liberties, Justice and Home Affairs committees.

MEP Van Bossuyt presented her committee's activities about online platforms, the collaborative economy and digitalisation of the economy. MEP Vandenkendelaere presented the main aspects of the European Pillar of Social Rights on which he is shadow rapporteur. Finally, MEP Loones informed the HOTREC Membership about the last developments on the revision of the Visa Code and about the EU's intention to establish a new travel authorisation system called ETIAS for tourists from third countries exempted from Visa requirements.

The presentations were followed by a policy debate, giving HOTREC a strong opportunity to share with these leading EU policy makers the sector's positions on unfair practices from online platforms, on the need to better regulate the collaborative economy, and on the necessity to quickly revise the Visa code to attract further international tourists from booming source markets such as China and others.

MEP Anneleen Van Bossuyt, MEP Tom Vandenkendelaere and MEP Sander Loones, 19 October 2017, HOTREC General Assembly in Antwerp

HOTREC shared with leading EU policy makers its positions on the regulation of platforms, the EU's pillar of social rights and the need to revise the visa code.

HOTREC discusses tourism development with the new Austrian minister for Tourism, during HOTREC Vienna GA



Ms. Elisabeth Köstinger, Austrian minister for tourism and sustainability, HOTREC General Assembly, 26 April 2018

On the occasion of HOTREC's 76th General Assembly held in Vienna on 26 April 2018 thanks to HOTREC Austrian Members APHA, APRA and VVAT, HOTREC welcomed as a guest of honour Ms. Elisabeth Köstinger, a former member of the European Parliament who was appointed as the Minister for Tourism and Sustainability in the recently appointed Austrian government. Ms. Köstinger presented the priorities of her government to develop tourism. In particular, she explained that her government is currently reflecting on the creation of a new masterplan for tourism development at national level. This includes discussions on quality, employment in the sector and access to financing, improving tourism marketing and implementing an ambitious digitalisation strategy for tourism. At European level, the Austrian government will try to ensure a strict respect of the principle of subsidiarity, to promote a level-playing field in tourism with less red-tape and to launch discussions in the next European Tourism Forum to be held in Vienna on strategic visions for sustainable tourism linked to quality of life.

2017 HOTEL RESULTS ACROSS EUROPE, BY MKG GROUP

2017 in Europe: A year full of dynamism

SEGMENT	Occupancy Rate		ADR		RevPAR	
	%	Change (pts)	€ VAT excl.	Change (%)	€ VAT excl.	Change (%)
2*	72,4%	1,8	65,2	2,2%	47,2	4,8%
3*	71,2%	2,3	78,2	2,2%	55,7	5,6%
4*	72,2%	2,4	112,6	2,6%	81,3	6,1%
5*	70,7%	2,7	198,5	2,3%	140,3	6,5%
GLOBAL	71,8%	2,3	97,1	2,4%	69,7	5,8%

Observatory MKG Consulting / OlaKala_destination - see <http://mkg-group.com/mkg-group-expert-hotelier/>

The year 2017 was beneficial for hotel business in the vast majority of European countries. January 2017 was marked by a significant upturn in occupancy rates and growth on all segments. The growth was mainly due to a significant increase in occupancy rate from January to April 2017. From May to December 2017, the increase is explained by an increase in both occupancy rate and average daily rates.

Europe welcomed 671 million international tourist arrivals in 2017

Europe welcomed 671 million international tourist arrivals in 2017, according to the European Tourism 2017-Trends & Prospects report by the European Travel Commission. The continent thus recorded an impressive 8% increase compared to 2016 (620 million) and is once again the world's number-one destination for the eighth consecutive year.

Destinations that had been affected by terrorist events in 2015 and 2016, such as the Paris region, Belgium and Nice, managed to recover from these negative episodes and achieve very encouraging performances in 2017.

Over the year, the cumulative RevPAR of the European hotel industry reached +5.8% growth, driven upwards by the 4* and 5* hotels, which recorded respectively +6.1% and +6.5% growth, while the 2* and 3* hotels posted respectively +4.8% and +5.6% growth. Overall, the occupancy rate across all segments increased by 2.3 percentage points on average over the year, from 69.5% to 71.8%. The increases in the indicators are slightly more visible on the 4* and 5 categories, with +2.4 points and +2.7 points. The 2* and 3* categories, with occupancy rates up +1.8 and +2.3 percentage points respectively, already have high figures: 72.4% and 71.2% respectively in OR. In parallel with the same parameters, average daily rates rose by 2.4%: the increases were more pronounced in the 4* and 5* categories (+2.6% and +2.3% respectively) compared to +2.2% for the 2* and 3* hotels. 2017 was punctuated by dynamic months; January registered the highest growth in RevPAR with +8.5% for all European countries while the lowest growth was felt in June with +2.5% in RevPAR.

For some countries in the Mediterranean basin and the Iberian Peninsula, 2017 was a particularly good year. Portugal recorded the best European RevPAR growth performance with +18.8%, due to an increase in occupancy rate by +2.8 points to 75.7% and +14.5% growth in average room rates to 91.8 euros. Lisbon and Porto achieved noteworthy success with respectively +21.3% and +18.1% growth in RevPAR.

Greece recorded the second largest increase in European RevPAR 2017 with +14.7% growth compared to 2016, and with an occupancy rate up +3.6 points and an average daily rate up +8.9%. The country is buoyed by the good results of its capital city: Athens recorded a 17.7% increase in RevPAR over the year.

Spain, the second-largest tourist destination in 2017, posted a RevPAR of +9.6%, resulting from average prices that rose throughout the year (+7.8%). The destination, known for being inexpensive, posted a 13.2% increase in RevPAR on the economy segment.

Destinations in the Mediterranean seem, as in 2016, to benefit from the interest of tourists who previously traveled to Maghreb countries, Egypt or Turkey. 2017 also turned out to be a good year for the Benelux countries: Belgium, the Netherlands and Luxembourg each surpassed the +10% growth rate for their RevPARs.

Belgium is recovering from the terrorist attacks that struck the Brussels airport and metro and had negative consequences on the tourism industry. After a drop in RevPAR by -11.8% in 2016, the country posted a 13.9% increase in RevPAR in 2017 thanks to a 6.8 point increase in occupancy rate and a 3.2% increase in average daily rates. It also reports a sharp upturn in the occupancy rate from March 2017, while average daily rates start to rise from May 2017 and visibly increase at the end of the year, from September to December. In contrast with the previous year, the capital city posted an occupancy rate of 70.4% in 2017, up 9.1 points and a RevPAR up +17.7%.

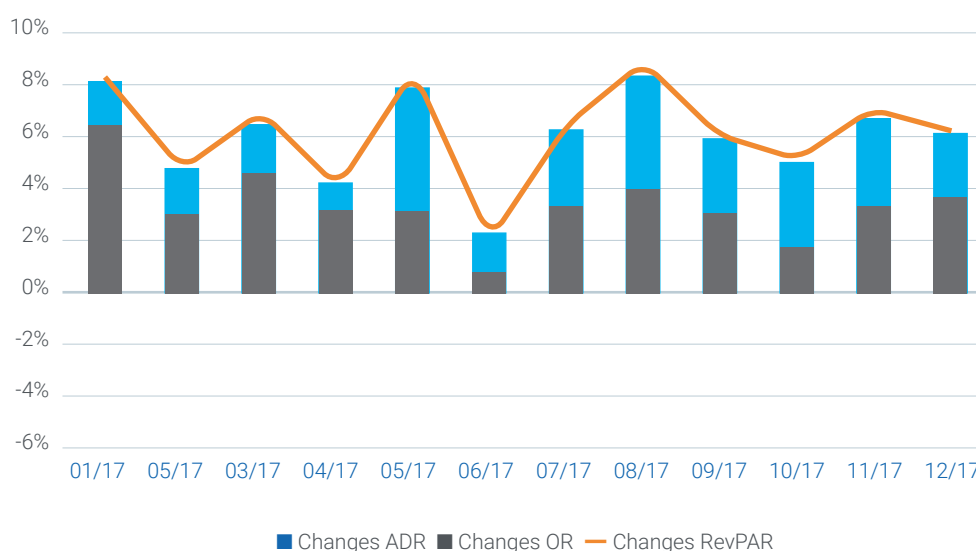
The Dutch market performed well throughout the year thanks to a balanced increase in occupancy rate and average daily rates leading to +10.4% growth in its RevPAR. Double-digit growth in major cities (Amsterdam, Rotterdam, Utrecht and The Hague) is responsible for this result. RevPAR in Luxembourg also recorded a significant increase by 12.3%.

Western European countries observe moderate but visible changes in RevPAR. Driven by the good performance of the cities of Cardiff and Edinburgh (RevPAR growth by +10.9% and +11.5%) and by the dynamism of each hotel segment, the United Kingdom recorded a 5.6% increase in RevPAR. With +2.1% growth in its RevPAR, Germany was supported by Cologne (+10.8%) and slowed down mainly by Munich (-2.7%), Nuremberg (-6.7%), Dusseldorf (-1.9%) and Essen (-4.8%).

In France, the overall RevPAR 2017 reported to 4.9% increase driven by the good performance of the midscale (+5.7%) and high-end (+5.1%) segments, mainly due to a favorable occupancy rate throughout the year. With an occupancy rate of 78.7% (+6.3 points) and 8.6% growth in RevPAR, the capital is following a healthy dynamic in 2017.

Eastern Europe also reported a +9.8% increase in RevPAR for Prague, +12.3% for Budapest and +4.7% for Poland. Warsaw has an occupancy rate of 80.3%, up +1.5 points, Prague has an OR at 80.8% (+2.9 points) and Budapest an OR of 77.3% (+1.5 points).

Apart from a slight decline in Switzerland's performance (-0.7% in RevPAR) due to falling prices, the European hotel sector signed a favorable year 2017, marked by the recovery of the countries affected by the terrorist attacks of 2015 and 2016. Figures thus point to a brighter future for the continent.



2017 KEY FIGURES FOR RESTAURANTS AND BARS IN SELECTED EUROPEAN COUNTRIES

In 2017, the restaurant and bars/cafés sector experienced steady growth in most countries surveyed by HOTREC. The Nordic and Baltic regions seem to be leading the growth in turnover, with fast growing countries such as Denmark, Estonia and Latvia. The only exception seems to be France, which is still recovering from its drop in activity in 2016 caused by terror attacks.

AUSTRIA

Positive results but market concentration ongoing



Restaurant and bar turnover (2016)

+6.41%



Restaurant and bar employment (2016)

+2.98%



Number of establishments (2017):

Bars/
discothèques:
-2.56%

Cafés
-2.03%

Cafés-restaurants:
-2.05%

Inns:
-2.8%

Restaurants
+ 2.22%

ESTONIA

A fast growing sector



Restaurant and bar turnover

+15.04% reaching
486 million EUR



Restaurant and bar employment

+5.48%



Number of establishments:

+12.96%

FINLAND

Strong rise in restaurant activity



Restaurant turnover

+4.5%



Restaurant employment

+3%



Number of restaurant establishments:

+1.5%

LATVIA

Double digit growth in the sector's turnover



Restaurant and bar turnover

+10.6% reaching a total
of **583 million EUR**



Restaurant and bar employment

-2.73%



Number of establishments:

-1.62%

SWEDEN

Steady growth in turnover and employment



Restaurant and bar turnover

+4%















Restaurant and bar employment

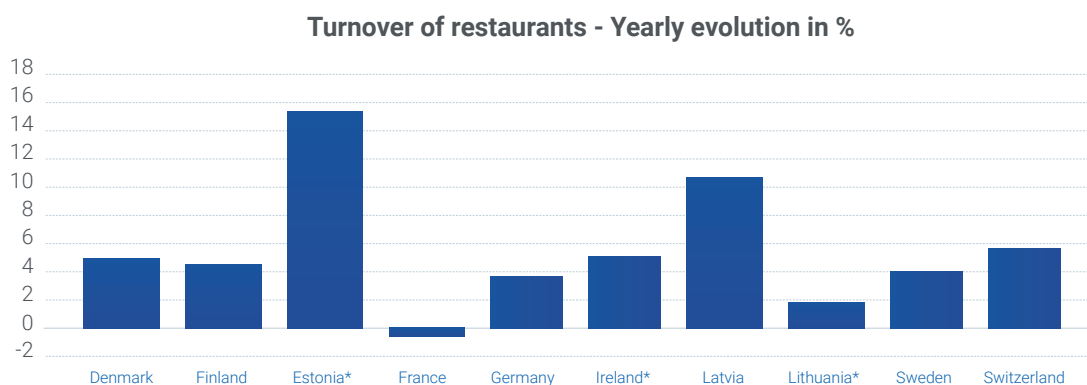
+2.5%



Number of establishments:

+2%

DENMARK <i>A strong growth ongoing</i>	 Restaurant and bar turnover +5% (expected)	ITALY <i>Stability for restaurants</i>	 Number of establishments: Restaurants: -0.18% Bars/café: +2.29%
IRELAND <i>Increase in revenues</i>	 Restaurant turnover +5%	FRANCE <i>A difficult recovery</i>	 Last quarter of 2017 turnover: Restaurant: +0.5% (annual turnover: -0.7%) Café-bars: -3% (annual turnover: -2.9%) Brasseries: -3.5% (annual turnover-1.9%)
GERMANY <i>Continuous rise in the restaurant sector's annual turnover</i>	 Restaurant turnover: +3.6% reaching 38.5 billion EUR Bar/pubs/café turnover: +0.3% reaching 7.7 billion EUR	 Restaurant employment: +1.6% representing a total of 1 012 000 persons Bar/ pubs/café employment: +0.4%	
LITHUANIA <i>A moderate growth in turnover and jobs</i>	 Restaurant and bar turnover +1.63% reaching a total of more than 584 million EUR	 Restaurant and bar employment +1.42%	
SWITZERLAND <i>A strong growth in revenues</i>	 Restaurant and bar turnover +5.59% reaching a total of 23.619 billion CHF	 Restaurant and bar employment +0.21% reaching a total of 173.215 persons	
NORWAY <i>Firm growth in turnover and number of establishments</i>	 Restaurant and bar employment +4%	 Number of establishments: +2.92%	



Figures for Estonia, Ireland, Latvia, Lithuania, Sweden and Switzerland aggregates data for both restaurants and cafés

MEET THE TEAM AND THE EXECUTIVE COMMITTEE



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HOTREC Executive Committee and CEO during the HOTREC General Assembly in Malta on 20 October 2016

ACCESS THE MEMBERSHIP

FULL MEMBERS

AUSTRIA

APHA-Fachverband Hotellerie

www.hotelverband.at

CEO: Mag. Matthias Koch

APRA-Fachverband Gastronomie

www.gastronomieverband.at

President: Mario Pulker

CEO: Dr. Thomas Wolf

VVAT-Austrian Professional Copyright Users Association

www.vvat.at

President: Mario Pulker

CEO: Mag. iur. Andreas Hüttner

BELGIUM

Fed. Ho.Re.Ca. Bruxelles-Brussel

www.horecabruxelles.be

President: Yvan Roque

HORECA Vlaanderen

www.horecavlaanderen.be

President: Filip Vanheusden

CEO: Matthias De Caluwe

Fed. Ho.Re.Ca. Wallonie

<http://horecawallonie.be>

President: Thierry Neyens

Secretary General: Pierre Poriau

CROATIA

UPUHH-Association of Employers in Croatian Hospitality

www.upuhh.hr

President: Ronald Korotaj

CEO: Dr.sc. Iva Bahunek

THE CZECH REPUBLIC

AHRCR-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: Verni Loodmaa

General Manager: Maarika Liivamägi

FINLAND

FHA-Finnish Hospitality Association

www.mara.fi

President : Harri Ojanperä

CEO: Timo Lappi

FRANCE

GNC-Groupement National des Chaînes

www.umih.fr

Président: Jacques Barré

Administrateur: Samuel Lacombe

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

www.synhorcat.com

President : Didier Chenet

Director General : Franck Trouet

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 Zöllnick

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

President: László Könnnyid

Secretary General: István Kovács

IRELAND

IHF-Irish Hotels Federation

www.ihf.ie

President: Michael Lennon

Chief Executive: Tim Fenn

RAI-Restaurants Association of Ireland

www.rai.ie

President : Liam Edwards

Chief Executive: Adrian Cummins

ITALY

FEDERALBERGHI-Federazione delle Associazioni Italiane Alberghi e Turismo

www.federalberghi.it

President: Cavaliere del Lavoro Bernabò Bocca

Director General: Doctor 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 (Janis Pinnis in absence of Mr. Valodze)

CEO: Mag. Santa Graikste

LITHUANIA

LHRA-Lithuanian Hotel and Restaurant Association

www.lvra.lt

President : Evalda Siskauskiene

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

THE NETHERLANDS

KHN-Dutch Hotel, Restaurant and Café Association

www.khn.nl

Chairman of the Board: Robèr Willemsen

General Director : Lodewijk van der Grinten and Rob Bongenaar

POLAND

IGHP- Chamber of Commerce of the Polish Hotel Industry

www.ighp.pl

President: Ireneusz Węglowski

Secretary General: Marcin Mączyński

ZPHoReCa-Association of Employers HoReCa

<http://www.zphoreca.pl>

President & CEO: Marcin Zawadzki

SLOVAKIA

ZHRSR-The Slovak Association of Hotels and Restaurants

www.zhrs.sk

President: Tomáš ONDRČKA

Secretary General: Marek Harbulák

SLOVENIA

TGZ-Tourism and Hospitality Chamber of Slovenia

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

President: Juan Molas

Secretary General: Ramón Estalella

FEHR-Federación Española de Hostelería

www.fehr.es

President: José Luis Yzuel Sanz

Secretary General: Emilio Gallego Zuazo

Gremi d'Hotels de Barcelona

www.barcelonahotels.org

President: Jordi Clos Llombart

Director General: Manel Casals

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: Grímur Sæmundsen

CEO: Helga Árnadóttir

LICHTENSTEIN

LHGV-Liechtensteiner Hotel & Gastronomieverband

www.lhgv.li

CEO: Dr. Marcello Scarnato

NORWAY

NHO Reiseliv-Norwegian Hospitality Association

www.nhoreiseliv.no

President: Ole Warberg

CEO: Kristin Krohn Devold

OBSERVERS

GEORGIA

HOREKA-Georgian Hotel Restaurant Café Federation

www.horeka.ge

President: Ketevan Meladze

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: Timur Bayindir

General Manager: İsmail Taşdemir

THE UNITED KINGDOM

UKHospitality

www.almr.org.uk

Chairman: Steve Richards

CEO: Kate Nicholls

EXECUTIVE COMMITTEE

Mag. Susanne Kraus-Winkler,

MRICS, HOTREC President, Vice-President of APHA,

Managing partner of the LOISIUM Hotel Group

Dr. Akos Niklai,

HOTREC Vice-President, Honorary President of HHRA, Hungarian

Hotel and Restaurant Association, Vice-President of Business

Hungary, Managing Director of Kárpátia Hospitality Co.

Marinus Cordesius,

LI.M, HOTREC Treasurer, Director Policies/International Affairs of

KHN, Koninklijk HORECA Nederland

Dr. Agni Christidou,

Member, CEO of HCH, Hellenic Chamber of Hotels

Adrian Cummins,

Member, CEO of RAI, Restaurants Association of Ireland, and Chair

of the HOTREC Restaurant & Pub Task Force

Ramón Estalella,

Member, Secretary General of CEHAT, Confederación Española

de Hoteles y Alojamientos Turísticos, and Chair of the HOTREC

'Sharing' Economy Task Force

Samuel Lacombe,

Member, Administrator of Groupement National des Chaînes (GNC)

Markus Luthe,

Member, CEO of IHA-D, Hotelverband Deutschland (IHA), and Chair

of the HOTREC Distribution Task Force

Manfred Pinzger,

Member, Vice-President of Federalberghi,

Member of the Board of FIPE, Owner and Manager of the Hotel

Val Venosta Vinschgerhof***S, Silandro

Marc Van Muylders,

Member, Vice-President of Fed. Ho.Re.Ca Brussels and President

of the Hotel and Guest Accommodations section of the Brussels

Region (Belgium), elected on 26 April 2018 in replacement of

Mr. Danny Van Assche who was appointed CEO of UNIZO

Jens Zimmer Christensen

Member, President of HORESTA Denmark,

Owner and Manager of Hotel Maritime, Copenhagen

Bernd Geyer,

HOTREC Honorary President

Joan Gaspart,

Observer, Vice President EHF, European Hospitality Foundation,

President of HUSA HOTELS

SOCIAL DIALOGUE COMMITTEE (SSD)

Jean-Marc Banquet d'Orx,

Chair, General Treasurer of UMIH, Union des Métiers et des

Industries de l'Hôtellerie

Andrew Agius Muscat,

Member, CEO of MHRA, Malta Hotels and Restaurants Association

Dave Danckaerts,

Member, Data Protection Officer of HORECA Vlaanderen

István Kovács,

Member, Secretary General of HHRA, Hungarian Hotel and

Restaurant Association

Mag. Santa Graikste,

Member, CEO of AHRL, Association of Latvian Hotels and

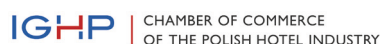
Restaurants

LATE NIGHT ENTERTAINMENT TASK FORCE

Antonio Flamini,

Chair, Vice-President of SILB-FIPE, Federazione Italiana Pubblici

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