

Industrial relations

Representativeness of the European social partner organisations: Hotels, restaurants and café (HORECA) sector



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(HORECA) sector**



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Introduction

The aim of this representativeness study is to identify the relevant national and supranational social partners – that is, the trade unions and employer organisations – in the hotels, restaurants and catering (HORECA) sector, and to show how they relate to the sector's European interest associations representing employees and employers. The report is divided into three chapters: an overview of the economic specificities and the employment trends in the HORECA sector; an analysis of the social partner organisations in the 28 EU Member States, and an analysis of the relevant European organisations, in particular their membership composition and capacity to negotiate.

In this section, the objectives of the study are presented along with an introduction to the applied methodology. The context of this study is the European sectoral social dialogue committee for the HORECA sector, which was established in 1999 (Eurofound, 2012).

Objectives of the study

Representativeness studies are conducted for three reasons.

- The European Commission aims to confirm the representativeness of the social partner associations consulted under Article 154 of the Treaty on the Functioning of the European Union (TFEU).
- Representativeness is a criterion to be eligible for setting up a European sectoral social dialogue committee, or participating in one of them.
- Representativeness also means having the capacity to negotiate agreements that can lead to an implementation by Council Decision, as provided by Article 155 of the TFEU.

Representativeness is defined by European Commission Decision 98/500/EC on the establishment of sectoral dialogue committees promoting dialogue between social partners at European level (European Commission, 1998). It includes the following requirements for an organisation to be recognised as a representative EU-level social partner organisation.

- The organisation must relate to specific sectors or categories and be organised at European level.
- The organisation should include organisations that are themselves an integral and recognised part of Member States' social partner structures, with the capacity to negotiate agreements, and are representative of several Member States.
- The organisation should have adequate structures to ensure its effective participation in the work of the sectoral social dialogue committees

To accomplish its aims, the study first identifies the relevant national social partner organisations in the HORECA sector before analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both the national and European level of interest representation. The study includes only organisations whose membership domain is classed as HORECA (i.e. 'sector-related'). In terms of territorial coverage, the study includes the EU28.

European sectoral social dialogue committee for the HORECA sector

At European level, the European Commission established a sectoral social dialogue committee for the HORECA sector in 1999, while the social partners had been working together in an informal working party since 1983 (Eurofound, 2012).

European social dialogue has been active in this sector since 2007. The dialogue has covered a range of issues including corporate social responsibility, qualification and training, skills, life-long learning, youth employment, platform economy, health and safety, sexual harassment and violence at the workplace, undeclared work, refugees, combatting sexual exploitation of children in travel and tourism. A common project of the European social partners fine-tunes the European Hospitality Skills Passport (EHSP) which was created in the social dialogue committee (European Commission, 2010).

Definitions and methodology

The methodology applied in this study is linked to the criteria identified in European Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity. In agreement with the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT), the Association of Hotels, Restaurants, Pubs and Cafes (HOTREC), and the European Commission, the HORECA sector is defined by NACE codes¹ 55 and 56. The HORECA sector breaks down into two subsectors: hotels and accommodation (NACE 55) and Food and Beverage service activities (NACE 56) in bars and restaurants.

It is worth noting that NACE code 56.29 (Other food service activities – contract catering) is excluded from the sectoral definition. This is because there is a separate European sector social dialogue committee for the contract catering subsector (Table 1).

Table 1: Demarcation of the HORECA sector with NACE codes

55	Accommodation	
55.10	Hotels and similar accommodation	
55.20	Holiday and other short-stay accommodation	
55.30	Camping grounds, recreational vehicle parks and trailer parks	
55.90	Other accommodation	
56	Food and beverage service activities	
56.10	Restaurants and mobile food service activities	
56.20	Event catering and food service activities	
	56.21	Event catering activities
	56.29	Other food service activities – Contract Catering
56.30	Beverage service activities (bars, taverns, coffee shops, etc.)	

¹ For the demarcation of a specific sector, reference is made to a number of codes from the ‘statistical classification of economic activities’ in the European Community (NACE Rev. 2).

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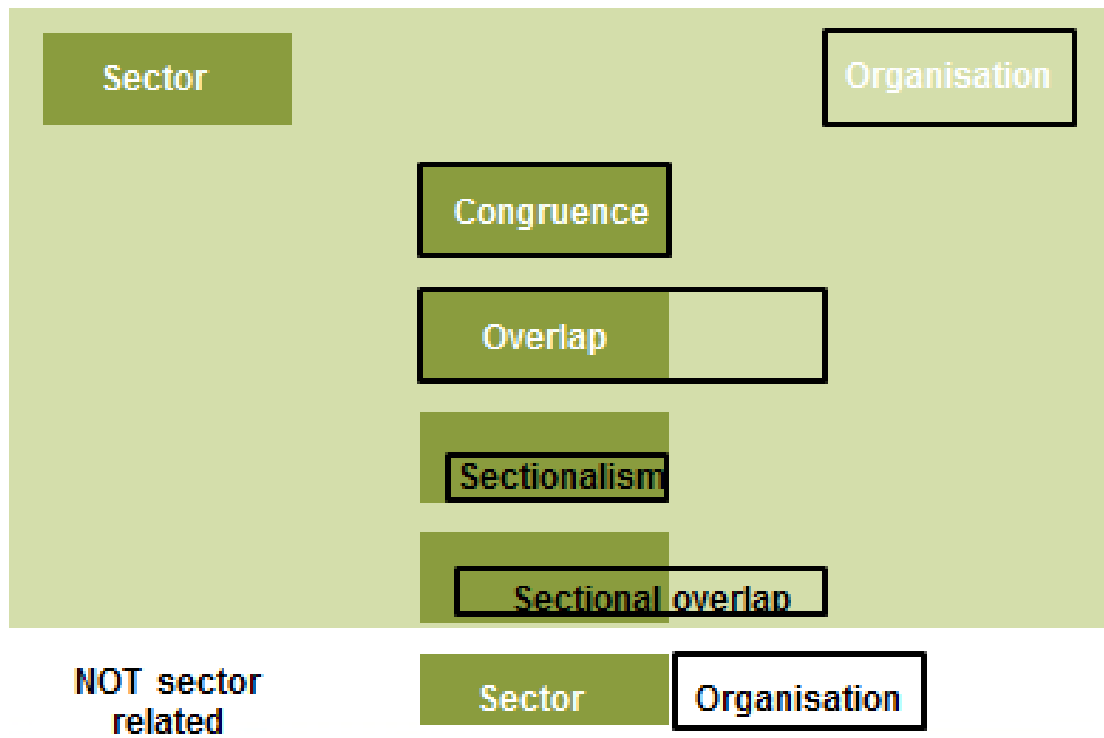
If the membership domains of trade unions and employers' organisations (Table 2) correspond exactly with this demarcation of the sector, this type of sector-relatedness is called 'congruence'. If the membership domain of an organisation goes beyond the HORECA sector as described here, this is termed an 'overlapping' membership domain, that is, it overlaps with another sector. The membership domain of an organisation is 'sectional' when it covers a part of the HORECA sector (and nothing else). 'Sectional overlap' is the type of membership domain which covers part of the HORECA sector as well as membership in other sectors.

Table 2: Domain patterns of the members of an organisation

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of the union/employer organisation embrace potentially all employees/companies in the HORECA sector?	Can the union/employer organisation also represent employees/companies outside the HORECA sector?
Congruence (C)	Yes	No
Overlap (O)	Yes	Yes
Sectional (S)	No	No
Sectional overlap (SO)	No	Yes

Figure 1 presents the four different types of sector relatedness graphically.

Figure 1: Four different types of sector relatedness



Membership is another important aspect of representativeness and this study looks at two levels. First, the geographical coverage of the EU-level organisations (i.e. how many Member States the EU-level trade union/employer organisation has affiliates in) and secondly, the organisational density of the national affiliates. The study also considers whether the EU-level players include most, or at least the strongest, national-level players, or whether there are major gaps.

Membership of a social partner organisation requires the payment of membership fees on a regular basis; however, some organisations are reluctant to inform third parties about such payments. Taking into account the limits of transparency, this study does not distinguish between different membership statuses and, where possible, indirect membership is also taken into account.

At EU level there are two social partner organisations: EFFAT and HOTREC.

In article 2 of the EFFAT statutes, membership is linked to membership of the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF). Double affiliation to both EFFAT and IUF is compulsory, and when an organisation applies for membership, it can only come into effect when the two executive Committees from both EFFAT and IUF have expressed agreement. Other trade unions may join EFFAT with the status of associated member provided they accept its statutes (constitution).

Article 3 of the HOTREC Statutes stipulates that 'member associations of HOTREC are the national associations representative of owners, operators and employers in the hospitality sector of the European Union countries, which are recognised as such by HOTREC and are legally established in their respective countries'. It also distinguishes between full members, associate members and observers. Associate members have the same rights and obligations as full members, with the only exception that they cannot be elected to the posts of President, Vice-

President or Treasurer. Observers are not entitled to vote and they cannot be elected to the executive committee or working group positions. Applications to join HOTREC must be endorsed by the member organisations already representing the country concerned within HOTREC, if any, and approved by the General Assembly by a simple majority vote.

The ‘organisational capacity’ of the European social partners is analysed in terms of their ability to participate effectively in the European sectoral social dialogue committee and commit themselves on behalf of their members, and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. For this assessment of the ‘capacity to negotiate’, the actors, their objectives and decision-making structures provided in their statutes are considered, as well as the outcome (in terms of agreed texts) and the processes through which the organisations obtained mandate, support and approval from their member organisations during the negotiation process.

The involvement of their members in national-level collective bargaining is important as it shows that affiliates are able to obtain a mandate to negotiate on behalf of their members. Being able to do so allows them to pass this mandate to the European-level organisation and to implement agreements or other jointly-agreed texts in an autonomous way. The capacity to act autonomously is important to allow effective contribution to the European sectoral social dialogue.

Finally, representativeness also depends upon the structures and resources of organisations, as well as their capacity to encourage active participation of their members, to combine the different interests of member organisations and to enhance their ability to act autonomously at European level. Effective participation in the European sectoral social dialogue committee meeting is assessed in terms of presence at committee meetings in the two years prior to publication of this report. Involving internal structures within the European organisations when preparing for committee meetings can increase efficiency and make those organisations that do not directly participate in the meetings also feel represented.

Data collection

The representativeness study combines top-down and bottom-up approaches for the collection of information on national sector related trade unions and employers organisations. The top-down approach includes all sector-related affiliates of the European associations EFFAT and HOTREC, while the bottom-up approach includes all other organisations involved in sector-related collective bargaining in the EU28 and their membership of European-level organisations. Unless cited otherwise, this study draws on the country studies provided by the Network of Eurofound correspondents. Where precise quantitative data could not be obtained, estimates are provided rather than leaving a question blank.

Thus, the quantitative data may stem from three sources:

- official statistics and representative survey studies
- administrative data, such as membership figures provided by the respective organisations (e.g. to calculate density rates)
- estimates, expert opinions and assessments made by the Network of Eurofound correspondents or representatives of the respective organisations

Quality assurance

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of drawing up this study.

Firstly, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound correspondents. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, if necessary, asked the correspondents to revise them. European social partners helped to collect the missing information, and were asked to check unclear aspects of this study, in February and March 2018.

A draft version of this report was presented to the European social partners in May 2018 to allow their affiliates to double-check information and add comments. As the partner organisations can see the reported information of other organisations in the same country and, if necessary, comment on the credibility or correctness of the information of their rivals, this process included an element of mutual control and recognition.

In addition, the national members of the Eurofound Governing Board were invited to check the consistency of the information in this report, to ensure that the bottom-up approach included all relevant sector-related organisations.

Draft versions of the overview report were shared with EFFAT and HOTREC Europe and the European Commission for feedback and comments.

The final report, taking these comments into account, was evaluated and approved in a meeting of the Eurofound advisory committee on Industrial Relations on 5 July 2018. Before publication a final version of the report was approved by EFFAT and FoodServiceEurope in October 2018.

Structure of the report

The report consists of three main chapters:

1. a brief summary of the economic background of the HORECA sector
2. an analysis of the relevant social partner organisations in the EU28
3. consideration of the representative associations at European level

Chapter 4 presents the conclusions, based on the findings presented in chapters one to three. A number of supplementary tables are included in the annex of this report.

Finally, it is important to distinguish between research and the political dimensions of this study. While providing data on the representativeness of the organisations under consideration, the report does not decide whether the representativeness of the European social partner organisations and their national affiliates is sufficient or adequate.

1. Economic background and employment specificities of the sector

Labour market trends and working conditions at EU level

The HORECA sector (NACE 55 and 56) employed 10,555,500 people in 2016, representing around 5% of total employment in the European Union, according to the Eurostat European Labour Force Survey. Food and beverage service activities is the biggest subsector, accounting for 75% of total HORECA employment. Women account for 54% of the total workforce.

Across the EU28, there were 1,921,244 HORECA enterprises in 2015 (the last year with available figures), according to the Structural Business Statistics. In the accommodation sector there were 321,446 enterprises that generated €85,692.5 billion of value added. In food and beverage service activities there were 1,599,798 enterprises that generated €167,154 billion of value added. HORECA is mainly made up of small businesses; according to the Structural Business Statistics, 85% of the companies in the accommodation sector and 90% in food and beverage service activities employed less than 10 employees in 2015.

Regarding the workforce characteristics of the HORECA sector, attention should be drawn to its close relationship with the tourism industry, which is the largest employer of third country national migrant workers (European Commission, 2016a). The sector also employs a high share of young people, providing many with their first employment experience (European Commission, 2016a; Ernst & Young, 2013).

In terms of working conditions, HORECA has been identified as one of those sectors recording higher levels of undeclared and fraudulent work, a high share of temporary jobs, and low wages (Eurofound, 2012; Eurofound, 2016). Seasonality, which is a key feature of the tourism industry, leads to a higher rate of temporary contracts compared to other economic sectors.

In recent years, high levels of youth unemployment in the European Union has led the European Commission to develop some measures with a view to supporting young people's labour insertion into this sector. These include a series of policy actions and tools to be used by the industry, with the aim of tackling the skills challenge and exploiting the tourism industry's potential for creating jobs and growth. Since 2014, [EURES](#) – the EU Job Mobility Portal – has offered a dedicated section for generating skills passports for the tourism and hospitality sector, thanks to a joint effort with the relevant EU-level social partners. This tool facilitates a better match of supply and demand in the labour market and contributes to improving the mobility of European workers. EURES has also developed a [Tourism Business Portal](#) which provides information, tutorials and tools for SMEs to learn more about various skills, such as setting up, managing, promoting and going digital with their tourism business. To help tourism entrepreneurs improve their digital skills, the Commission has published a [pilot series of webinars](#) on the online marketing of tourism. In cooperation with the industry and academia, the Commission is developing the European Skills/Competences, Occupations and Qualifications 11 classification specifically dedicated to the skills profiles needed in the tourism sector (European Commission, 2016a).

The HORECA sector has been characterised by widespread changes, many of them associated with digitalisation of the tourism industry and the rise of collaborative economy, particularly the so-called 'peer-to-peer' short-term accommodation rentals managed by online platforms. According to a study conducted by PwC (2016), peer-to-peer accommodation is the largest sector within the collaborative economy by total transaction value. The expansion of collaborative economy within the accommodation sector risks encouraging unfair practices, and the European employer association HOTREC has expressed concern on this, denouncing existing abuses.

According to HOTREC, unfair practices are not only misleading consumers, but are also damaging businesses through a lack of transparency between platforms and their suppliers (HOTREC, 2017). EFFAT also referred to this new phenomenon in a speech by Harald Wiedenhofer, general secretary of EFFAT, at the 5th General Assembly of the Hellenic Chamber of Hotels. The EFFAT general secretary stressed the problem of unfair competition, referring to the ways in which peer-to-peer platforms are lowering prices, which harms hotel company revenues, while also avoiding national regulation in terms of health and safety, consumer protection, liability rules, employees' rights and fiscal obligations. This common concern among the European social partners led HOTREC and EFFAT to agree on the joint statement on the sharing economy, 'For a level playing field and fair competition in hospitality and tourism' (4 December 2015). In this joint statement, both social partners

call upon the public authorities to collect more coherent data about the scope and the impact of the 'sharing economy' on businesses and employment in the hospitality and tourism sector, and to guarantee that legislation is fully respected by and enforced upon all providers of hospitality and tourism services.

(HOTREC and EFFAT, 2015).

Responding to these concerns, the European Commission decided in May 2016 to launch investigations on unfair practices with its Communication on Online Platforms and the Digital Single Market Opportunities and Challenges for Europe (European Commission, 2016b).

Recent employment trends in EU28 countries

Tables 3 and 4 give a general overview of the development of the sector from 2012 to 2016, (or the closest year with available data).

Table 3 presents figures on total employment (2016), differences in employment from 2012 to 2016, percentage of female employment in 2016, share of total employment in the sector (2016) and employees as a percentage of employment in the sector (2016). Table 4 presents figures on companies and differences in companies from 2012 to 2016.

Table 3: Employment in the HORECA sector, 2016

Country	Total employment	Difference in employment 2012–2016 (%)	Female employment as a percentage of total employment in the sector	Share of employees in employment in the sector (%)	Share of sectoral employment as a percentage of total employment in the economy	Data
AT	290,120	7.8	59	83.4	7.0	2015
BE	N.A.	N.A.	N.A.	N.A.	N.A.	
BG	124,933	-2.1	53.6	85.6	4.9	2015
CY	36,855	5.7	N.A.	95.0	10.2	2015
CZ	166,500	7.1	46.8	79.8	3.2	
DE	1,579,000	4.9	35.1	121.1	3.6	Figures

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						include data for NACE Code 56.29 and 55.90, as they are only available on a 3-digit level.
DK	96,194	16.2	98.5	91.4	3.4	2015
EL	331,411	25.3	32.7	65.3	6.8	Figures include data for NACE Code 56.29
EE	26,500	49.8	77.4	95.8	4.1	Figures include data for NACE Code 56.29
ES	1,604,200	20.0	0.1	79.6	8.8	Figures include data for NACE Code 56.29
FI	49,666	8.8	N.A.	N.A.	2.2	Preliminary data for 2016
FR	N.A.	N.A.	N.A.	N.A.	N.A.	
HR	44,218	-10.7	70.8	128.6	4.1	
HU	79,805	22.3	0.0	97.5	1.6	
IE	148,000	25.1	37,5	N.A.	7.6	
IT	1,186,796	-2.2	42.8	63.1	5.3	2014
LT	38,198	16.0	64.9	94.5	2.9	
LU	16,361	9.0	47.2	94.6	3.9	
LV	31,616	22.3	66.6	95.2	5.0	
MT	13,300	-5.0	33.1	89.5	7.0	
NL	405,000	12.2	44.0	85.9	4.6	2015. Figures include data for NACE Code 56.29
PL	376,200	8.6	57.8	83.4	2.3	
PT	292,522	14.5	N.A.	64.7	8.0	Figures include data for NACE Code 56.29
RO	159,917	7.3	N.A.	96.8	N.A.	
SE	N.A.	N.A.	N.A.	N.A.	N.A.	

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SI	32,806	9.7	52.8	86.3	4.0	
SK	103,300	9.9	54.9	84.8	4.1	
UK	2,209,000	16.4	N.A.	N.A.	7.3	

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017). Sources of the data in this table are included in Table A9 in the annex.

Note: N.A.= Not available

Table 4: Number of companies in the HORECA sector

Country	Number of companies (2016)	Differences in companies 2014–2016 (%)	Share of self-employed and one-person companies as percentage of total companies	Share of small companies (2-50 people) as percentage of total companies	Data
AT	46,930	6.3	N.A.	98.9	2015
BE	57,488	1.0	13.4	N.A.	
BG	24,597	-1.3	57.2	41.7	2015
CY	5,004	6.9	42.6	54.8	2015
CZ	144,668	2.1	85.0	14.8	
DE	235,858	-0.5	N.A.	99.2	
DK	12,802	-0.6	55.8	66.6	2015
EL	86,696	2.9	49.8	N.A.	Figures include 56.29
EE	2,695	24.8	N.A.	97.4	Figures include 56.29
ES	276,093	-3.4	34.3	61.9	Figures include 56.29
FI	11,710	8.1	82.2	20.3	Figures include 56.29
FR	272,289	8.4	N.A.	98.7	2014
HR	19,790	12.8	31.3	68.0	2015
HU	29,151	-5.4	45.5	99.3	
IE	N.A.	N.A.	N.A.	N.A.	
IT	310,518	1.4	29.4	70.4	2015. Data does not include NACE code 56.21
LT	5,519	34.2	0.1	54.6	Figures include 56.29
LU	2,622	-4.0	24.3	77.3	Figures include 56.29

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LV	3,556	16.0	29.7	68.0	
MT	4,377	24.3	93.1	5.5	Figures include 56.29
NL	52,225	13.3	0.0	55.0	
PL	53,988	9.1	51.5	47.9	2014
PT	92,802	10.7	N.A.	N.A.	
RO	25,126	8.8	N.A.	N.A.	2015
SE	31,810	7.7	40.1	58.9	2015
SI	11,416	25.5	59.7	39.9	
SK	19,321	0.8	38.1	23.9	
UK	185,510	9.6	30.4	67.7	

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017). Sources of the data in this table are included in Table A10 in the annex.

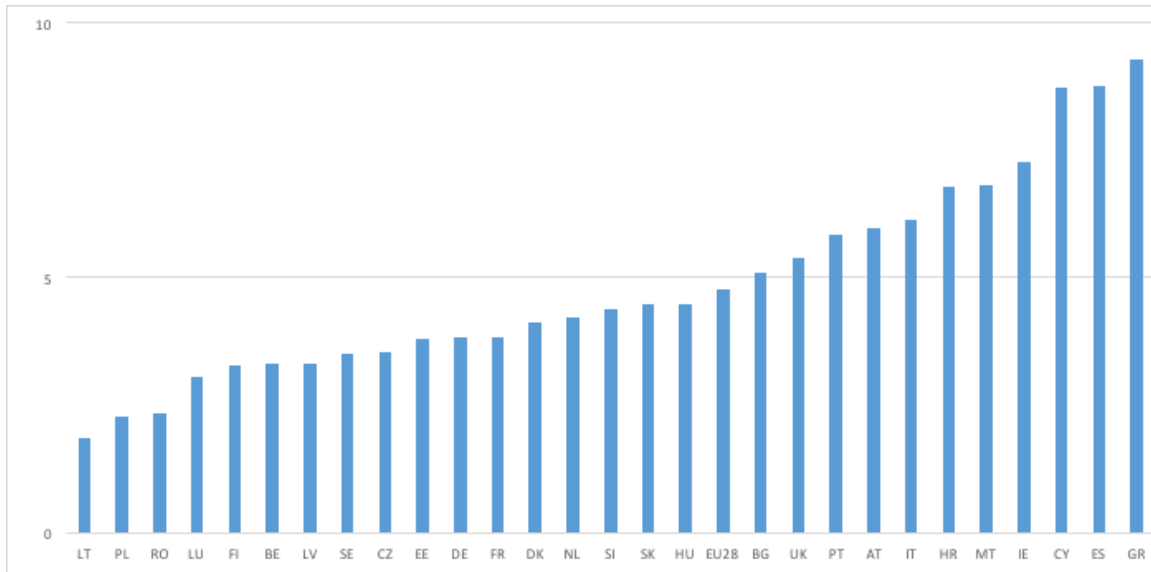
Note: N.A. = Not available

Data collected through the Network of Eurofound correspondents in Table 3 show that from 2012 to 2016 only four countries recorded a decrease in employment: Croatia (-10,7%), Malta (-5%), Italy (-2.2%) and Bulgaria (-2.1%). The remaining countries recorded an increase. One group of countries records a moderate increase; lower than 10% (Austria, Cyprus, Czech Republic, Germany, Finland, Luxembourg, Poland, Romania, Slovakia and Slovenia). A second group is made up of countries recording an increase between 10% and 20% (Denmark, Lithuania, the Netherlands, Portugal, Spain, and the UK.). Finally, a third group of countries records a sharp increase; higher than 20% (Estonia, Greece, Hungary, Ireland and Latvia).

The number of companies shown in Table 4 has decreased in Bulgaria, Denmark, Germany, Hungary, Luxembourg and Spain. Nevertheless, all these countries record a small drop; lower than 5%.

Figure 2 below provides the share of sectoral employment as a percentage of total employment in the economy. For comparative purposes, data has been extracted from the European Labour Force Survey (EU-LFS) and also includes contract catering. Overall, EU-LFS does not present relevant differences compared with data from national sources provided by correspondents, except in five countries. For Croatia, Greece and Hungary, EU-LFS estimates that the share of HORECA employment as a percentage of total employment in the economy is between two (Greece) and three (Croatia and Hungary) percentage points higher compared to national sources. For Portugal and UK, LFS estimates that the share of HORECA employment as a percentage of total employment in the economy is around two percentage points higher compared to national sources.

Figure 2: Share of sectoral employment as a percentage of total employment in the economy. NACE codes 55 and 56



Source: Eurostat, Labour Force Survey

Figure 2 identifies a group of 11 countries in which employment in the HORECA sector as a percentage of total employment in the economy is higher than the share of sectoral employment at EU level (4.8%). These countries are Greece (9.3%), Spain (8.7%), Cyprus (8.7%), and Ireland (7.2%). Malta (6.8%), Croatia (6.8%), Italy (6.1%), Austria (6%), Portugal (5.8%), UK (5.4%) and Bulgaria (5.1%). In most of these countries tourism is one of the main industries and the relevance of HORECA sector may be a result of its close relationship with this industry.

2. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the HORECA sector.

The study has identified a total of 55 sector-related trade unions in 26 EU Member States and 71 sector-related employer organisations in 27 EU Member States (Table 5).

Table 5: Number of sector-related organisations per country, 2016-2017

Number of sector-related organisations	EU Member States with respective number of trade unions	EU Member States with respective number of employer organisations
0	LT, RO	RO
1	CZ, DE, DK, EL, FI, HU, LV, MT, PL, SK	BG, DK, EE, HR, LT, LU, LV, MT, PL, SK, UK
2	AT, CY, EE, HR, IE, LU, PT, SE	CZ, HU, IE, NL
3	BE, BG, NL, SI, UK	AT, CY, DE, EL, FI
4	ES, IT	ES, SE, SI
5		PT
6	FR	BE, IT
7	-	-
8		FR

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

All 28 Member States except Romania record at least one employer organisation. In Romania, the study has identified one sector-related employer association (the Federation of Romanian Tourism Employers (FPTR)); however, it does not meet the methodological criteria to be included in the study as it is not involved in collective bargaining and/or affiliated to HOTREC. From the 27 countries that record at least one employer organisation, the study has found that one sector-related employer organisation is recorded in 11 countries, two in four countries, three in five countries, four in three countries, five in one country, six in two countries and eight in one country. So in 16 countries there is some fragmentation, because at least two organisations exist in the sector. However, the degree of fragmentation greatly varies across countries.

On the employee side, only Lithuania and Romania do not have an organisation that meets the criteria to be included. In Lithuania there is no longer a sector-related trade union. Before the 2008 crisis, there were two sectoral trade unions in Lithuania that previously had some members in the sector: the Trade Union of Lithuanian Food Producers (LMP) and the Accommodation and Hotels Trade Union 'Solidarumas' (AIVPS Solidarumas). However, they lost their members during the crisis and did not attract new ones. In Romania, the study has identified one trade union with members in the sector (FST Minerva). However, this organisation is neither involved in collective bargaining nor affiliated to EFFAT, so it does not meet the methodological criteria to be included. It is worth noting that, as shown in Figure 2, Lithuania and Romania are among the

three European countries with the lowest share of HORECA employment as a percentage of total employment in the economy (1.9% and 2.3%, respectively). From the 26 countries that record at least one trade union, 10 countries record only one sector-related trade union, eight countries record two trade unions, five countries record three trade unions, two countries record four trade unions and one country records six trade unions. Accordingly, in 16 countries there is some fragmentation. The trade unions' landscape is less fragmented than the employer organisations' landscape as only eight countries record more than two trade unions. On the employer side, there are 12 countries in which the study observes more than two employer organisations.

Whether the existence of several trade unions and employer organisations in the sector and in the same country is the result of national organisations' sectoral divisions (hotels and accommodations, restaurants and mobile food service activities, etc.), or a response to the fact that social partners' domains overlap with each other, will be checked in the next section, which presents the analysis of domain patterns. This will enable us to see whether several trade unions or employer organisations in a country are active in the same activities, or whether they are specialised in different sectoral segments or occupations. Taking this into account, it must be stressed that the sectoral definition of this study, detailed in the previous section, does not include contract catering activities, although in many countries, they can be included within the organisational domain of trade unions or employer organisations. This aspect will be also checked.

Sector relatedness of trade unions

Trade unions' domain will be firstly assessed by classifying them according to the four patterns of sector-relatedness domain explained in the methodological section.

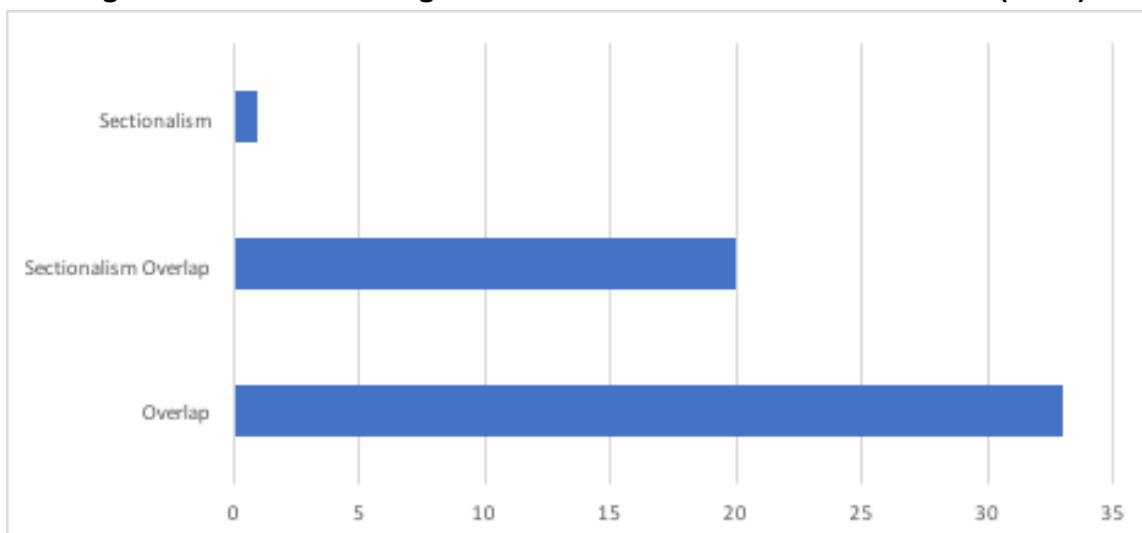
Information on domain coverage is available for all the trade unions except one (STB in Bulgaria). Attention should be drawn to the fact that there is not one trade union that demarcates its domain in a way that is **congruent** with the sectoral definition. This fact implies that statistical definitions of business activities of the sector differ from the lines along which employees identify their interests.

Sectionalism is recorded in only one of the cases: NfCSCT Podkrepa CL in Bulgaria, which only covers part of the subsector of hotels and other accommodation (NACE 55.10).

Sectional overlap occurs in 20 cases (37% of the trade unions with available information), as shown in Figure 3. It is explained by three different domain demarcations. Firstly, as a result of unions' demarcations covering only a particular subsector, but also activities outside HORECA; generally contract catering, as well as other activities, such as the food industry (the Bakers, Food and Allied Workers' Union (BFAWU) in the UK). Secondly, it occurs when trade unions' demarcations cover some categories of workers exclusively, for example blue-collar workers (VIDA in Austria, the United Federation of Danish Workers (3F) in Denmark or the Swedish Hotel and Restaurant Workers' Union (HRF) in Sweden) or white-collar workers (Unionen in Sweden or the National Federation of Managers and Professionals of the Commerce, Transport, Tourism and Tertiary sectors (Manageritalia) in Italy), but also cover other activities outside the sector such as contract catering (which all of them cover), transport and health services (VIDA in Austria) or commerce (Manageritalia in Italy). Thirdly, sectional overlap is the outcome of trade unions which, although covering the whole sector plus other activities beyond, are only active in some regions (the Patriotic Workers' Commission (LAB) and the Basque Workers' Solidarity Services (ELA) in Spain, and the Catering and Tourism Workers' Union of Slovenia at Confederation '90SDGiTS (KS90) in Slovenia).

Finally, **overlap** is the most widespread domain. It is recorded in 33 cases (61% of the trade unions with available information), as shown in Figure 3. It is explained by trade unions' demarcations which cover the whole sector, including all the activities, categories and regions, as well as activities beyond the HORECA sector. All the trade unions recording overlap, except the Estonian Seamen's Independent Union (EMSA) in Estonia, are also covering contract catering. Other activities covered are: tourism (the Czech-Moravian Trade Union of Catering, Hotels and Tourism (ČMOS PHCR) in the Czech Republic and the Hungarian Trade Union of Catering and Tourism (VISZ) in Hungary), travel agencies (the Autonomous Trade Union of Catering and Tourism of Croatia (STUH) in Croatia), the food and beverages industry (the Trade Union of Food, Beverages, Tobacco, Hotel and Catering and Allied Workers (NGG) in Germany and the Food and Hotels Industry of the Trade Union Confederation of Luxembourg (OGBL) in Luxembourg), or services in general (the Services Federation of the Trade Union Confederation of Workers' Commission (CCOO-SERVICIOS) in Spain). Some trade unions have an almost cross-sectoral domain (the General Workers' Union (GWU) in Malta and The Union (De Unie) in the Netherlands).

Figure 3: Domain coverage of trade unions in the HORECA sector (N=54)



Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Table 6 below shows the domain patterns of the trade unions within HORECA and contract catering only. The colour green shows when the trade union domain covers the different subsectors and grey when the trade union domain does not cover the subsectors. A first aspect to note is that the domain of the trade unions within the sector tend to overlap with another trade union for countries with a pluralist trade union landscape. This shows that the trade union landscape is actually fragmented in the 17 countries with more than one trade union in the HORECA. Only in Ireland can we see that the two trade unions identified are covering different subsectors. However, it is worth mentioning that, as previously explained, fragmentation does not occur in Austria and Sweden because, although they cover the whole sector, each trade union is covering different workers' categories. This is why they have a sectionalism overlap domain.

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With regard to the specific features of the trade unions' domains within the sector, it is observed that 46 trade unions out of 55 identified in 26 countries cover the entire sector, as is defined in this study, or most of the sector, excluding some employee categories (for instance white collar workers). Thus, in most of the countries, trade unions have a comprehensive sector domain covering all the diverse activities included in our definition. Only in Bulgaria, Estonia, Ireland, Romania and UK are there trade unions that only cover some parts of the sector.

Attention should also be drawn to the fact that only six trade unions out of the 55 identified do not cover the contract catering sector (56.29). The remaining 49 trade unions are active in both HORECA (or part of HORECA) and contract catering.

Please see Annex 2, Table A6 for the full names of the trade unions.

Table 6: Sector coverage of the HORECA sector-related trade unions

Country	Trade union	HORECA				Catering	Domain pattern
		55	56.10	56.21	56.30	56.29	
AT	GPA-djp						Sectionalism overlap
AT	VIDA						Sectionalism overlap
BE	ABVV-FGTB Horval						Overlap
BE	ACLVB-CGSLB						Overlap
BE	ACV-CSC Voeding en Diensten						Overlap
BG	ITUFECCTS						Sectionalism overlap
BG	NFCSCT Podkrepa CL						Sectionalism
BG	STB						N.A.
CY	OYXEKA – SEK						Overlap
CY	SYXKA – PEO						Overlap
CZ	ČMOS PHCR						Overlap
DE	NGG						Overlap
DK	3F						Sectionalism overlap
EE	EMSA						Overlap
EE	ETKA						Sectionalism overlap
EL	POEYTE						Overlap
ES	CCOO-SERVICIOS						Overlap
ES	ELA-ZERBITZUAK						Sectionalism overlap
ES	FeSMC – UGT						Overlap
ES	LAB						Sectionalism overlap
FI	PAM						Overlap
FR	CFDT Services						Overlap

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FR	CFTC CSFV						Overlap
FR	CGT Commerce						Overlap
FR	FGTA/FO						Overlap
FR	INOVA / CFE-CGC						Overlap
FR	UNSA Commerce et Services						Overlap
HR	SIKD						Overlap
	STUH						Overlap
HU	VISZ						Overlap
IE	Mandate						Sectionalism overlap
IE	SIPTU						Sectionalism overlap
IT	FILCAMS-CGIL						Overlap
IT	FISASCAT						Sectionalism overlap
IT	Manageritalia						Sectionalism overlap
IT	UILTUCS-UIL						Sectionalism overlap
LU	LCGB Services & Commerce						Overlap
LU	OGBL						Overlap
LV	LAKRS						Overlap
MT	GWU						Overlap
NL	CNV Vakmensen						Overlap
NL	De Unie						Overlap
NL	FNV Horecabond						Overlap
PL	NSZZ Solidarność						Overlap
PT	FESAHT						Overlap
PT	SITESE						Sectionalism overlap
SE	HRF						Sectionalism overlap
SE	Unionen						Sectionalism overlap
SI	SDGiTS KS90						Sectionalism overlap
SI	Sindikat GiT						Overlap
SI	SOPS						Sectionalism overlap
SK	OZ POCHR						Overlap
UK	BFAWU						Sectionalism overlap
UK	GMB						Sectionalism overlap
UK	Unite the Union						Sectionalism overlap

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Note: N.A. = Not available

	<i>Domain covers the entire subsector</i>
	<i>Domain covers the subsector partially (i.e. does not cover all occupations, all forms and size of enterprise or all regions of the country)</i>
	<i>Domain does not cover the subsector</i>

The number of active trade union members differs widely, ranging from around 1,600,000 (the Christian National Union Federation Professionals (CNV Vakmensen) in the Netherlands) to 200 (the Trade Union of Crafts and Entrepreneurship Slovenia (SOPS) in Slovenia). This considerable variation reflects differences in the size of the economy and the comprehensiveness of the membership domain rather than the ability to recruit members. Therefore, density is the measure of membership strength, which is more appropriate for comparative analysis. However, as most of the trade unions included in the study have a domain which is not aligned with the sectoral definition used in this study, they had problems providing membership figures distinguishing members from HORECA from other activities such contract catering. As a result, sectoral density figures cannot be provided.

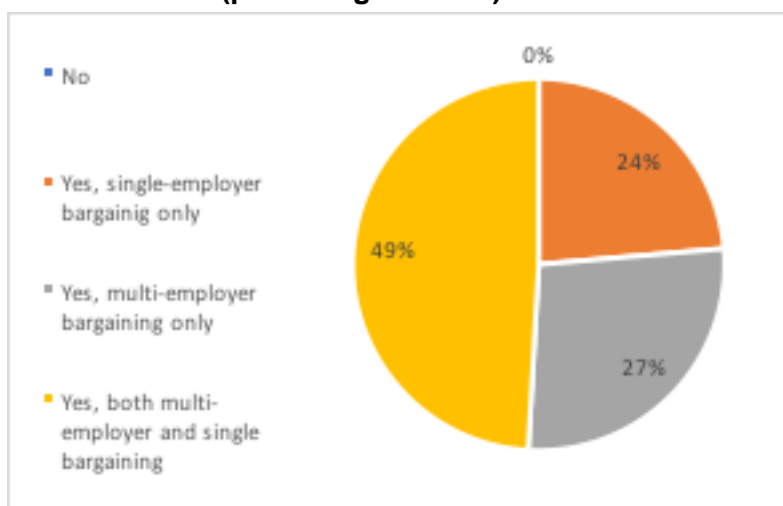
Trade union involvement in collective bargaining and social dialogue

Involvement of trade unions in collective bargaining and social dialogue is a crucial indicator to measure their relevance. By being involved in sector-related collective bargaining, trade unions take part in rule-making processes leading to joint regulation about terms and conditions of employment of employees. Trade unions' involvement in collective bargaining and social dialogue is also of great interest in this study, bearing in mind that European sectoral social dialogue and, especially, some of its outcomes – the so-called autonomous agreements – rely on the ability of the European organisations' national affiliates to regulate employment terms and influence national public policies affecting the sector (Perin and Léonard, 2011; Marginson and Keune, 2012).

The study has found that trade unions in all the countries are involved in sector-related collective bargaining (Figure 4). Accordingly, in all countries except Romania and Lithuania, where no trade unions meeting the criteria to be included were identified, there are trade unions that take part in collective bargaining in the HORECA sector.

Collective bargaining can be carried out at multi-employer level, at national or regional level (covering a sector or a branch of activity) or at single-employer level (covering only a company or group of companies). In the HORECA sector there are 13 unions involved only in single-employer bargaining (24%), 15 trade unions involved exclusively in multi-employer bargaining (27%) and 27 involved in both single and multi-employer bargaining (49%). This strongly depends on the prevalent collective bargaining structure existing in the country and sector, so in countries where collective bargaining is completely decentralised in the HORECA sector (Estonia, Ireland, Luxembourg, Malta, Poland, Slovakia and the UK), trade unions only conduct single-employer level bargaining. Precise information on the sectoral collective bargaining structure that exists in each country is provided in the next chapter.

Figure 4: Involvement of trade unions in different forms of collective bargaining (percentage of total) N= 55



Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Beyond trade unions' role in collective bargaining, it is worth analysing their involvement in policymaking as a final indicator of their relevance. To do this, correspondents have gathered information on whether trade unions are consulted by the government on policies affecting the sector, the regularity of that consultation, and the influence they assess the consultation process to have.

According to the data gathered, 27 trade unions out of 36 with available information report that they are consulted (75%). This implies that trade unions are consulted in 19 countries. From these, 15 trade unions in 12 countries report that they are consulted on a regular basis. Finally, we find that 19 trade unions in 14 countries report that they have influence in policymaking through this consultation process.

Table 7: Trade unions' involvement in policymaking

No consultation reported by any union and/or no information available	EE, EL, ES, IT, PL, PT, SI
Consultation with at least one trade union	AT, BE, BG, CY, CZ, DE, DK, FI, FR, HR, HU, IE, LU, LV, MT, NL, SE, SI, SK
Regular consultation	AT, BE, CY, CZ, FI, FR, HU, LV, MT, SE, SI, SK
Influence	AT, BE, BG, CY, DE, FI, FR, HR, LU, LV, MT, SE, SI, SK

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Since a multi-union system has been established in 16 countries, it cannot be ruled out that the authorities favour certain trade unions over others, or that unions are competing for participation rights. In France and Slovenia, only some of the sector-related trade unions are consulted, meaning that there are trade unions which are not consulted. In Sweden, information is only available for one of the two trade unions included (HRF).

Sector-relatedness of employers' organisations

As we did for the trade unions, the employer organisations' sector-relatedness domains will be firstly assessed by classifying them according to the four patterns explained in the methodological section. Information on the domain patterns is available for 69 out of the 71 employer organisations included in the study (Figure 5).

Only one association (Royal Horeca Netherlands (KHN) in the Netherlands) shows a membership domain that is more or less **congruent** with the sector definition. This means that the domain of this organisation largely focuses on HORECA, as defined for the purpose of this study. As with the trade unions, this implies that that statistical definitions of business activities of the sector differ from the lines along which employers identify their interests.

Sectionalism is the most widespread domain. It occurs in 25 of the cases (36%). It is caused by domain demarcations which only cover some specific subsectors within the HORECA. Normally, employer organisations recording sectionalism cover only:

- hotels and similar accommodation (the Cyprus Hotel Association (PASYXE) and Association of Cyprus Tourist Enterprises (STEK) in Cyprus, or the Spanish Federation of Hotels and Holiday Accommodation (CEHAT) and the Employer Organisation of Hotels, Restaurants and Tourisms Apartments (CEHRATC) in Spain)
- hotels and accommodations *and* restaurants and mobile food service activities (the German Hotel Association (IHA) in Germany or the Malta Hotels and Restaurants Association (MHRA) in Malta)
- only restaurants and mobile food service activities (Food & Trends (A & T) and the National Employer Organisations for Food and Fast-food Restaurants (SNARR) in France)

Other organisations have a domain demarcation that covers only some regions. This is the case of Ho.Re.Ca Bruxelles, Horeca Vlaanderen and Horeca Wallonie in Belgium.

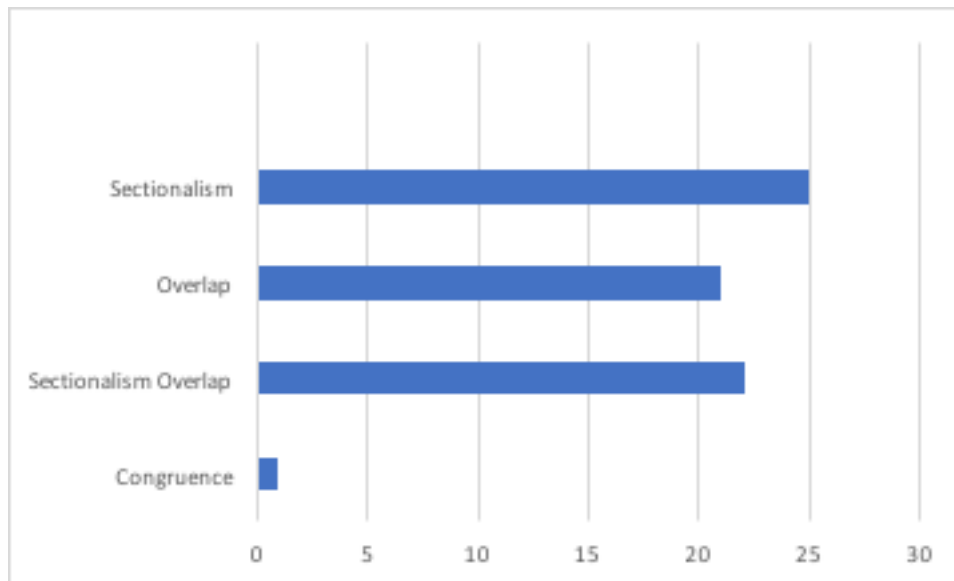
Sectional overlap occurs in 22 of the cases (32%). It is usually explained by domain demarcations which exclude some activities or subsectors within the HORECA sector (for instance, hotel and similar accommodations; beverage serving activities; or event catering activities) and cover other activities outside the sector, such as:

- contract catering (the Union Of Belgian Catering (UBC) in Belgium, the Federal Association of the System Catering Industry (BdS) in Germany, the Spanish Federation of Accommodation and Food Service Activities (FEHR) and the Spanish Federation of Catering Associations (FEADRS) in Spain or the Federation of Italian Hotel and Tourism Associations (Federalberghi) in Italy)
- amusement and recreation activities (FIPE in Italy)

It also occurs when employer organisations are only active in some regions and subsectors, and also cover some activities beyond HORECA (the Associations of Hotels and Tourist Resorts of the Algarve (AHETA) and the Association of Hotel Operators and Similar Services of the Algarve (AIHSA) in Portugal).

Cases of domain **overlap** (21 of the cases, 29%) occur when employer organisations cover different sectors and activities outside the HORECA sector. All the employer organisations that fall within this domain cover contract catering activities and some of them also cover other diverse activities.

Figure 5: Domain coverage of employer organisations in the HORECA sector (N= 69)



Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Table 8 below shows the domain patterns of the employer associations within the HORECA and contract catering sectors only. The colour green shows when the employer organisation domain covers the subsector and grey when employer organisation domain does not cover the subsector. As shown, the domains of the employer organisations within the sector overlap in the case of those countries with a pluralist landscape. Only in Spain we can see that each organisation is specialised in a different subsector. In other countries such as Belgium, overlap is not happening as result of domain demarcations that focus on certain kinds of companies or regions. In Belgium, it is also worth noting that the two organisations covering the same domain in all the regions (the Belgian Union of Catering (UBC) and the Belgian Modern Restaurant Association (BEMORA) are affiliated to the same organisation (COMEOS). Thus, some cooperation can be expected between them instead of competition. In Greece, where only two organisations claim to cover the same domain (the Hellenic Hotel Federation (HHF) and Hellenic Chamber of Hotels (HCH)), it is worth noting that both organisations have different purposes. HCH is a chamber whose membership is mandatory while HHF is a social partner involved in collective bargaining. Overall, this analysis shows that the employers' organisation landscape is fragmented in 13 out of the 16 countries with more than one employer organisation.

With regard to the specific features of those domains within the HORECA sector, it is observed that only 31 organisations out of the 68 identified with available information (46%) cover the entire sector, as is defined in this study, or most of the sector (excluding some company categories or being active only in some regions). Thus, we observe that in most of the countries there is at least one employer organisation specialised in a particular subsector. Finally, attention should be drawn to the fact that 38 of the organisations identified also cover the contract catering

Representativeness of the European social partner organisations: Hotels, restaurants and café (HORECA) sector

sector (56.29) compared to 31 that do not. (For two organisations, this information was not available). Thus, compared to the trade unions, employer organisations' domains cover this sector to a lesser extent.

Please see Annex 2, Table A7 for the full names of the employer organisations.

Table 8: Sector coverage of the HORECA sector-related employer organisations

Country	Employer organisation	HORECA			Catering		Domain
		55	56.10	56.21	56.30	56.29	
AT	FVG						Sectionalism overlap
AT	FVH						Sectionalism overlap
AT	VVAT						Sectionalism overlap
BE	BEMORA (part of COMEOS)						Sectionalism overlap
BE	COMEOS						Overlap
BE	Ho.Re.Ca Bruxelles						Sectionalism
BE	Horeca Vlaanderen						Sectionalism
BE	Horeca Wallonie						Sectionalism
BE	UBC (part of COMEOS)						Sectionalism overlap
BG	BTC						N.A.
CY	OSIKA						Sectionalism
CY	PASYXE						Sectionalism
CY	STEK						Sectionalism overlap
CZ	AHRČR						Overlap
CZ	SOCR						Overlap
DE	BdS						Sectionalism overlap
DE	DEHOGA						Overlap
DE	IHA						Sectionalism
DK	HORESTA						Overlap
EE	EHRL						Overlap
EL	HCH						Sectionalism
EL	HHF						Sectionalism
EL	POESE						Sectionalism
ES	CEHAT						Sectionalism

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ES	CEHRATC						Sectionalism
ES	FEADRS						Sectionalism overlap
ES	FEHR						Sectionalism overlap
FI	AVAINTA						Overlap
FI	KT						Sectionalism overlap
FI	MaRa						Overlap
FR	A & T						Sectionalism
FR	FNHPA						Sectionalism
FR	GNC						Sectionalism
FR	GNI						Sectionalism
FR	SNARR						Sectionalism
FR	SNRPO						Sectionalism
FR	SNRTC						Sectionalism
FR	UMIH						Overlap
HR	HUP UUT						Overlap
HU	MSZÉSZ						Sectionalism
HU	VIMOSZ						Overlap
IE	IHF						Sectionalism
IE	RAI						Sectionalism
IT	ANGEM						Sectionalism overlap
IT	Assoturismo						Sectionalism overlap
IT	Confindustria AICA						Sectionalism overlap
IT	FAITA Federcamping						Sectionalism
IT	Federalberghi						Sectionalism overlap
IT	FIPE						Sectionalism overlap
LT	LVRA						Overlap
LU	HORESCA						Overlap
LV	LVRA						Overlap
MT	MHRA						Sectionalism
NL	KHN						Congruence
NL	NHG						N.A.
PL	IGHP						Sectionalism overlap

Representativeness of the European social partner organisations: Hotels, restaurants and café (HORECA) sector

PT	AHETA	Light Green	Grey	Grey	Grey	Grey	Sectionalism overlap
PT	AHP	Green	Grey	Grey	Grey	Grey	Sectionalism
PT	AHRESP	Green	Green	Green	Green	Green	Sectionalism overlap
PT	AIHSA	Light Green	Yellow	Yellow	Light Green	Yellow	Sectionalism overlap
PT	APHORT	Green	Green	Green	Green	Green	Overlap
SE	Almega	Grey	Light Green	Grey	Light Green	Grey	Sectionalism overlap
SE	LI	Grey	Light Green	Grey	Grey	Grey	Sectionalism overlap
SE	Svensk Handel	Grey	Light Green	Grey	Grey	Grey	Sectionalism overlap
SE	Visita	Green	Green	Green	Green	Green	Overlap
SI	SGT OZS	Green	Green	Green	Green	Green	Overlap
SI	TGZS	Green	Green	Green	Green	Green	Overlap
SI	ZDOPS	Green	Green	Green	Green	Green	Overlap
SI	ZDS	Green	Green	Green	Green	Green	Overlap
SK	ZHR SR	Green	Green	Green	Green	Green	Overlap
UK	ALMR	Green	Green	Grey	Green	Grey	Sectionalism

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Green	<i>Domain covers the entire subsector</i>
Light Green	<i>Domain covers the subsector partially (i.e. does not cover all occupations, all forms and size of enterprise or all regions of the country)</i>
Grey	<i>Domain does not cover the subsector</i>
Yellow	<i>Info not available.</i>

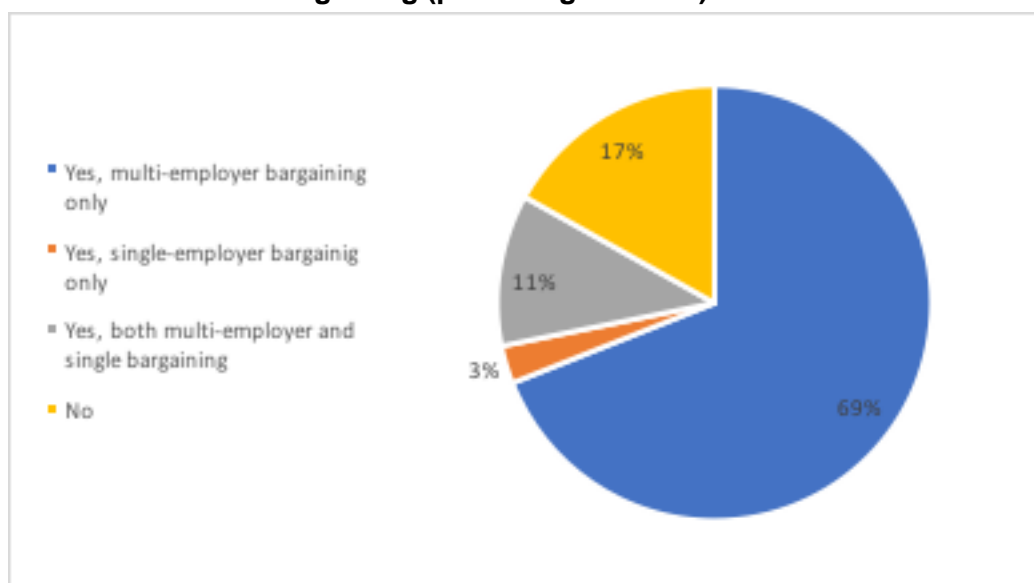
Employer organisation involvement in collective bargaining and social dialogue

The study has found that 59 employer organisations (83%) are involved in sector-related collective bargaining. The following countries do not have an employer organisation involved in collective bargaining: Estonia, Greece, Lithuania, Luxembourg, Malta, Poland, Slovakia and the UK. Organisations specialised in matters other than industrial relations are commonly defined as 'trade associations' (Behrens and Traxler, 2004). Bearing this in mind, it could be assumed that the 12 organisations not involved in collective bargaining act as trade organisations. It is worth mentioning that, according to national legislation, HCH in Greece is not a social partner and has no authority to sign collective agreements. Its main role is to consult with the government on tourism and hospitality issues. Membership of HCH is mandatory for all the hotels and camping sites in the country. The methodology for these studies specifies that trade associations or similar

organisations, such as HCH, are only included if they are affiliated to HOTREC, so all trade associations that are not affiliated to HOTREC have been excluded from the study.

Overall, employer organisations are normally involved in multi-employer bargaining (Figure 6). Single-employer bargaining is generally negotiated between employee representatives (work council or similar body or trade union representatives) and firm representatives, without the mediation of an employer organisation. However, in the HORECA sector we find two employer organisations that are only involved in single-employer bargaining (the Restaurant Association of Ireland (RAI) in Ireland and the Swedish Trade Federation (Svensk Handel) in Sweden) and eight organisations that are involved in both single and multi-employer bargaining.

Figure 6: Involvement of employer organisations in different forms of collective bargaining (percentage of total) N=71



Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

As far as the involvement of employer organisations in policymaking is concerned, the study has found that 51 employer organisations out of 56 with available data report that they are consulted (91%). This implies that employer organisations are consulted in 24 countries. In Bulgaria, the Netherlands and Portugal, information was not available. From these, 30 organisations in 15 countries also report to be consulted on a regular basis. Finally, we find that 36 employer organisations in 18 countries report that they have influence in policymaking through this consultation process (Table 9).

Table 9: Employer organisations' involvement in policymaking

No information available	BG, NL, PT
Consultation with at least one employer organisation	AT, BE, CY, CZ, DE, DK, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, MT, PL, SE, SI, SK, UK
Regular consultation	BE, CY, CZ, EL, FI, FR, HR, HU, IT, LT, LU, MT, SE, SI, SK
Influence	AT, BE, CY, DE, EE, EL, FI, FR, HU, IE, IT, LT, LU, LV, MT, PL, SI, SK

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Finally, it is worth checking the extent to which authorities favour certain employer organisations in the 16 countries where a pluralistic employer organisation landscape exists. In France, Greece and Slovenia, only some of the sector-related employer associations identified in the study are consulted. That means that there are associations which are not consulted. In Austria, Spain and Sweden, information is not available for some of the organisations.

3. Collective bargaining patterns and social dialogue in the HORECA sector

System of collective bargaining

In this section, the report analyses the system of collective bargaining in the HORECA sector.

The data presented in Table 10 provides an overview of the system of sector-related collective bargaining in the 28 countries under consideration. The importance of collective bargaining as a means of employment regulation is measured by calculating the total number of employees covered by collective bargaining as a proportion of the total number of employees within a certain segment of the economy (Traxler et al., 2001). Accordingly, the sector's rate of collective bargaining coverage is defined as the ratio of the number of employees covered by any kind of collective agreement to the total number of employees in the sector.

Table 10: System of sectoral collective bargaining, 2017

Country	Collective bargaining coverage (estimated percentage)	Main bargaining level	Extension practices
AT	100	Multi-employer bargaining	1 (to all the employers due to the compulsory membership)
BE	100	Multi-employer bargaining	2
BG	N.A.	Multi-employer bargaining	0
CY	20	Multi-employer bargaining	0
CZ	25-30	Multi-employer bargaining	0
DE	20-30	Multi-employer bargaining	1 (very exceptional, in North Rhine Westphalia for workers earning low wages)
DK	60	Multi-employer bargaining	0
EE	3.6	Single-employer bargaining	1
ES	67	Multi-employer bargaining	2
EL	N.A.	Multi-employer bargaining	0
FI	90	Multi-employer bargaining	2
FR	96	Multi-employer bargaining	2
HR	100	Multi-employer bargaining	1
HU	100	Multi-employer bargaining	1
IE	N.A.	Single-employer bargaining	0
IT	100	Multi-employer bargaining	2 de facto (but not de jure)
LT	0	-	0
LU	13 (2013)	Single-employer bargaining	2

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Country	Collective bargaining coverage (estimated percentage)	Main bargaining level	Extension practices
LV	0	-	2
MT	12.6	Single-employer bargaining	0
NL	2	Multi-employer bargaining	1
PL	0.6	Single-employer bargaining	0
PT	98.7	Multi-employer bargaining	1 (only for subsectors 55.1, 56.1 and 56.29.)
RO	0	-	0
SE	65	Multi-employer bargaining	1 (by the so-called 'extension agreement')
SI	32	Multi-employer bargaining	2
SK	2	Single-employer bargaining	0
UK	3.9	Single-employer bargaining	0

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Notes: Extension practices: 0 = no practice, 1 = limited/exceptional, 2 = pervasive. Cases of functional equivalence are in parenthesis. N.A.. = not available

Information on collective bargaining coverage in the sector is difficult to estimate because, as explained in the section of the report focused on the national social partners' domain description, our sectoral definition is referring to different activities and realities. Accordingly, collective agreements negotiated in many of the countries are not congruent with the sectoral definition used in this study. Instead, they tend to cover activities beyond HORECA, usually contract catering but also, in some countries, other activities such as tourism. Besides, attention should be drawn to the fact that, in most of the countries, data on collective bargaining coverage can only be gathered for the 'accommodation and food activities sector'. Thus, data also includes contract catering activities (NACE code 53.29).

As can be seen in Table 11 below, there is no sector-related collective bargaining in Lithuania, Latvia and Romania. There are eight countries that record collective bargaining coverage rates higher than 80%. These are: Austria, Belgium, Croatia, Finland, France, Hungary, Italy and Portugal. In these countries 'multi-employer' is the main bargaining level, prevailing in terms of workers covered. In some of these countries, such as Finland, multi-employer bargaining is almost the only existing bargaining level, bearing in mind that there is only one single-employer agreement covering approximately 200 employees. An institutional characteristic of these countries, which contributes to this high coverage, is the existence of extension practices. A company which is not a member of an employer organisation can choose to sign an extension agreement with the relevant trade union, whereby it undertakes the obligation to provide its employees with the same rights and conditions as in the collective agreement the union has signed with the relevant employer organisation. In HORECA, around 75% of the agreements are multi-employer and 25% are extension agreements.

In some cases (Belgium, France and Finland), these practices are widespread and are common to most of the sectors. Other countries, such as Austria or Italy, do not have specific extension mechanisms, but there is a functional equivalent in place. On the contrary, in Croatia and Hungary they are relatively uncommon, and the extension mechanisms in place for the HORECA sector are an exception within the country's collective bargaining system. In Hungary, the sectoral level collective agreement was extended by decree of the Minister of Economy in 2001, and it became binding for all employers operating in hotel services, restaurant catering and confectioneries, as well as contract catering and workplace catering. In the case of Portugal, extension mechanisms were restricted in 2011 under the Memorandum of Understanding (MoU) by allowing extensions to be issued only if the employer organisation represented firms covering at least 50% of the workforce of the relevant sector. However, since 2015 there has been a return to an almost unconditional extension. In July 2014, with effect from January 2015, a new clause was added stating that extensions could also be issued if at least 30% of the membership of employer associations (in terms of the total number of firms) consisted of small- and medium-sized enterprises (firms with fewer than 250 employees). As most of the main employer associations met this representative clause, the new criterion means a return to the situation before the MoU reforms (Hijzen et al, 2017).

A second small group of three countries (Denmark, Spain and Sweden) record collective bargaining coverage rates that oscillate between 60 and 70%. In Spain, high collective bargaining coverage is a result of automatic extension mechanisms. In Denmark, where extension mechanisms are not in place, coverage is the result of high density rates of the trade union (3F) and, especially, the employer organisation (HORESTA). In Sweden, extension occurs quite often in the sector, but the practice is voluntary.

Finally, a third group of 11 countries record rates of collective bargaining coverage lower than 35%. In Cyprus, Czech Republic, Germany, the Netherlands and Slovenia, collective bargaining is mainly carried out at multi-employer level. While there is an extension mechanism in place in Slovenia, there is no such mechanism in Cyprus, Czech Republic and Germany. In the Netherlands, the sectoral collective agreement for the HORECA sector was exempt from this practice. In the remaining six countries (Estonia, Luxembourg, Malta, Poland, Slovakia and the UK) collective bargaining is mainly or exclusively carried out at company level. This would explain the existence of collective bargaining coverages that are much lower than the national average in countries such as Luxembourg, where correspondents report that the HORECA sector records one of the lowest rates of collective bargaining coverage among existing sectors.

Table 11: Collective bargaining coverage and level, 2017

	Collective bargaining coverage (>80%)	Collective bargaining coverage (60–70%)	Collective bargaining coverage (<35%)	Not available	No collective bargaining
Multi-employer bargaining only, or a prevailing level of multi-employer bargaining	AT, BE, FI, FR, HR, HU, IT, PT	DK, ES, SE	CY, CZ, DE, NL, SI	BG, EL	
Both single- and multi-employer collective bargaining					
Single-employer bargaining only, or a prevailing level of			EE, LU, MT, PL, SK,	IE	

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single-employer bargaining			UK		
No collective bargaining					LT, LV, RO

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Participation in public policy

National social partners' direct consultation

In the national social partners' section, the extent to which organisations are consulted in relation to sector-specific matters was analysed. In this section the report compares, at cross-country level, the extent to which public authorities consult both sides of the industry.

Employer organisations appear to be very much involved in consultation processes related to sector-specific matters, and in a more meaningful way than trade unions. In this sense, it is worth mentioning that in Estonia, Greece, Italy, Poland, Slovenia and Spain, trade unions claim they are not consulted on sector-related matters while employer organisations say they are consulted. In some of these countries (Estonia, Greece, Italy, Poland and Slovenia), employer organisations even report that consultation leads to real influence on sector-related policymaking (Table 12).

Table 12: National social partners' consultation

	Trade unions	Employer associations
No consultation reported by any organisation and/or no information available	EE, EL, ES, IT, PL, PT, SI	BG, NL, PT*
Consultation with at least one organisation	AT, BE, BG, CY, CZ, DE, DK, FI, FR, HR, HU, IE, LU, LV, MT, NL, SE, SI, SK	AT, BE, CY, CZ, DE, DK, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, MT, PL, RO, SE, SI, SK, UK
Regular consultation	AT, BE, CY, CZ, FI, FR, HU, LV, MT, SE, SI, SK	BE, CY, CZ, EL, FI, FR, HR, HU, IT, LT, LU, MT, SE, SI, SK
Influence	AT, BE, BG, CY, DE, FI, FR, HR, LU, LV, MT, SE, SI, SK	AT, BE, CY, DE, EE, EL, FI, FR, HU, IE, IT, LT, LU, LV, MT, PL, SI, SK

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Note: * For the employer organisations from BG, NL and PT, information on consultation was not available.

Tripartite/bipartite participation

The findings reveal that genuine sector-specific bodies have been established in 16 of the 28 countries under consideration (Table 13 below and Table A8 in the annex). Sector-specific bodies, whether bipartite or tripartite, have been established in Belgium, Bulgaria, Cyprus, Germany, Denmark, Finland, France, Croatia, Hungary, Italy, Malta, the Netherlands, Romania, Spain, Sweden and the UK.

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In most of the countries there are several bodies dealing with different issues. Regarding its scope of activity, the study has found bodies dealing with: welfare and pension funds (Belgium, Germany, Italy, the Netherlands), education, training and qualifications or competences (Belgium, Denmark, France, Italy, Malta, the Netherlands, Romania, Sweden), general social dialogue issues associated to the tourism sector (Belgium, Germany, Hungary), general policies focused on the tourism sector (Spain, Croatia, Romania), competitiveness and research and innovation (Finland, Sweden) and health and safety (Finland, the UK).

Table 13: Tripartite and bipartite sector-specific public policy bodies (2017)

Country	Bipartite or tripartite	Number of bodies	Scope of activity
BE	Bipartite	5	Welfare; education; pensions
BG	Tripartite	2	N.A.
CY	Tripartite	3	N.A.
DE	Tripartite and bipartite	2	Working conditions and training; pensions
DK	Bipartite	4	Training; work and environment
ES	Tripartite	1	Tourism sectoral policies
FI	Tripartite	2	Health and safety; competence
FR	Bipartite	7	Training; financing of paritarian bodies
HR	Bipartite	1	Tourism sectoral policies
HU	Bipartite	1	Cooperation and interest reconciliation forum
IT	Bipartite	7	Pensions; health care insurance; training fund
ML	Tripartite	2	Tourism studies; quality assurance mechanisms and validation of non-formal and informal learning
NL	Bipartite	1	Pensions
RO	Bipartite (public authorities and employer organisation), tripartite	2	Competitiveness and sectoral policies of tourism sector; occupations and qualifications in the tourism sector
SE	Bipartite	2	Scientific research and innovation within the hospitality sector; education
UK	Tripartite	1	Health and safety

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Notes: N.A. = Not available

4. European level of interest representation

At the European level, eligibility for consultation and participation in social dialogue is linked to three criteria laid down in Commission Decision 98/500/EC. Accordingly, social partner organisations must have the following attributes²:

- They must relate to specific sectors or categories and be organised at European level.
- They must consist of organisations which are themselves an integral and recognised part of Member States' social partner structures, have the capacity to negotiate agreements, and be representative of several Member States.
- They must have adequate structures to ensure their effective participation in the work of the committees.

Regarding social dialogue, the constituent feature is the ability of such organisations to negotiate on behalf of their members and to conclude binding agreements. Accordingly, this section on European associations of the HORECA sector will analyse these organisations' membership domain, the composition and relevance of their membership, and their capacity to negotiate, that is, their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. Finally, the extent to which other relevant European social partners, not involved in the European sectoral social dialogue committee, can be relevant in the HORECA sector will be checked.

As outlined in greater detail below, there is one sector-related European association on the employee side (EFFAT: the European Federation of Food, Agriculture and Tourism Trade Unions) and one on the employer side (HOTREC: the umbrella association of Hotels, Restaurants and Cafés in Europe), so the following analysis will concentrate on these organisations.

Membership domain

EFFAT has existed for 60 years³, although its current structure and name is the result of a merger concluded between two European trade union federations – the European Federation of Food, Catering and Allied Workers' Unions with the IUF (ECF-IUF) and the European Federation of Agricultural Workers' Union EFA – on 11 December 2000. According to its website, EFFAT represents more than 22 million workers in the Food, Agriculture and Tourism sectors, and has 120 national trade union affiliates located in 35 European countries. EFFAT is an autonomous organisation affiliated to the European Trade Union Confederation (ETUC). Its mission is to promote its members' interests in all European interprofessional issues, jointly and with strength. In recent years EFFAT has set up European Works Councils in more than 100 transnational groups. EFFAT also supports its member organisations in Central and Eastern Europe to develop free and solid trade unions.

² The criteria in the original text is in French. For more information, see European Commission (1998).

³ <http://www.effat.org/sites/default/files/news/9364/trade-unions-without-borders-for-social-europe-en.pdf>

HOTREC is the umbrella Association of Hotels, Restaurants, Pubs and Cafes and similar establishments in Europe, which brings together 44 national associations⁴ in 30 countries and is the voice of the hospitality industry in Europe. It therefore covers the whole HORECA sector as defined in this study. It covers hotels, restaurants and cafés, but it does not cover the contract catering sector. Its mission is to represent and champion its interests towards the EU and international institutions, as well as to all kind of relevant stakeholders, to foster knowledge-sharing and best practice among its Members, in order to further promote innovation, and to act as a platform of expertise for the European hospitality industry.

Table 14 below describes the domain patterns of the European social partners within the HORECA sector, based on the domain descriptions from the websites of the EU organisations, and scope of activity in terms of social dialogue.

Table 14: European social partners' domain patterns within the HORECA sector

	HORECA				Contract catering
European social partner	55 Accommodation	56.10 Restaurants and mobile food service activities	52.21 Event catering activities	56.30 Beverage service activities	56.29
EFFAT					
HOTREC					

Source: Author's own analyses, based on Network of Eurofound Correspondents (2017).

Hotrec has a membership domain that is congruent to the HORECA sector demarcation, while EFFAT has an overlapping membership domain, as it covers also other sectors like: contract catering, agriculture, sugar, and food and drink industries.

EFFAT membership composition

Table 15 below documents a list of membership-related trade unions for EFFAT drawn from the country reports. This membership list is confined to the sector-related associations of the countries under consideration; hence it does not include those trade unions affiliated to the European-level organisation which do not have any members in the HORECA sector. The membership of the employee organisations is obtained through the membership list provided by the organisations and a further check of the membership lists published on the organisation's webpages.

⁴ Since the HOTREC General Assembly in Krakow (18-19 October 2018), HOTREC welcomed the new member association: the Turkish tourism Investors Association (TTYD) from Turkey.

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Table 15: HORECA trade unions affiliated to EFFAT

Country	Trade union	Collective bargaining	Consultation		Influence
AT	GPA-djp	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	Real influence
AT	VIDA	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Real influence
BE	ABVV-FGTB Horval	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Real influence
BE	ACLVB-CGSLB	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Real influence
BE	ACV-CSC Voeding en Diensten	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Real influence
CY	OYXEKA – SEK	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Real influence
CZ	ČMOS PHCR	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	No
DE	NGG	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	Real influence
DK	3F	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	No
EL	POEYTE	Yes, multi-employer bargaining only	No	N.A.	No
ES	CCOO-SERVICIOS	Yes, both single- and multi-employer bargaining	No	N.A.	No
ES	FeSMC – UGT	Yes, both single- and multi-employer bargaining	N.A.	N.A.	No
FI	PAM	Yes, multi-employer bargaining only	Yes	On a regular basis	Real influence
FR	CFDT Services	Yes, both single- and multi-employer bargaining	N.A.	N.A.	No
FR	CFTC CSFV	Yes, both single- and multi-employer bargaining	N.A.	N.A.	No
FR	CGT Commerce	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Real influence
FR	FGTA/FO	Yes, both single- and multi-employer bargaining	No	N.A.	No
FR	INOVA / CFE-CGC	Yes, both single- and multi-employer bargaining	N.A.	N.A.	No
HR	STUH	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	Real influence

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HU	VISZ	Yes, multi-employer bargaining only	Yes	On a regular basis	No
IE	SIPTU	Yes, single-employer bargaining only	Yes	On an ad-hoc basis	No
IT	FILCAMS-CGIL	Yes, both single- and multi-employer bargaining	N.A.	N.A.	No
IT	FISASCAT-CISL	Yes, multi-employer bargaining only	N.A.	N.A.	No
IT	UILTUCS-UIL	Yes, both single- and multi-employer bargaining	No	N.A.	No
LU	OGBL	Yes, single-employer bargaining only	Yes	On an ad-hoc basis	Real influence
LV	LAKRS	Yes, multi-employer bargaining only	Yes	On a regular basis	Real influence
MT	GWU	Yes, single-employer bargaining only	Yes	On a regular basis	Real influence
NL	CNV Vakmensen	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	No
NL	FNV Horecabond	Yes, multi-employer bargaining only	N.A.	N.A.	No
PL	NSZZ Solidarność	Yes, single-employer bargaining only	No	N.A.	No
SE	HRF	Yes, multi-employer bargaining only	Yes	On a regular basis	Real influence
SE	Unionen	Yes, multi-employer bargaining only	N.A.	N.A.	No
SI	Sindikat GiT	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Real influence
SK	OZ POCHR	Yes, single-employer bargaining only	Yes	On a regular basis	Real influence
UK	BFAWU	Yes, single-employer bargaining only	N.A.	N.A.	No
UK	GMB	Yes, single-employer bargaining only	N.A.	N.A.	No
UK	Unite the Union	Yes, single-employer bargaining only	N.A.	N.A.	No

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Notes: N.A. = Not available

EFFAT has 37 direct affiliations in 23 countries under consideration which fulfil the criteria to be included in this study. It has no affiliations that meet the criteria to be included in Bulgaria, Estonia, Lithuania, Portugal and Romania. It must be stressed that this means EFFAT does not

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have members in these countries which are active in the HORECA sector as defined in the study. Although it may have organisations affiliated there, such as the National Food Industry Federation (FKP-PODKREPA) in Bulgaria or CERES in Romania, they are not included because they do not have members in the HORECA sector. Therefore, 67% of the trade unions listed in Annex 2, Table A6 are directly affiliated to EFFAT.

All the organisations affiliated to EFFAT are involved in sector-related collective bargaining. Regarding their involvement in consultation processes on sector-related matters, 21 organisations are consulted while five are not consulted. For the remaining 11 organisations, information was not available. Sixteen organisations report that they have influence on policymaking as a result of consultation.

Once we have analysed EFFAT national affiliations, it is relevant to check if some major national trade unions are not covered by EFFAT. For this purpose, it can be assumed that major trade unions are those that conduct collective bargaining and have opportunities to intervene in the national decision-making process.

The analysis of the 19 organisations detected in the study which are not affiliated to EFFAT reveals that all of them are involved in collective bargaining, according to the methodological criteria followed in the study. In terms of consultation, only six trade unions not affiliated to EFFAT are consulted: the Independent Trade Union Federation of Employees in Commerce, Cooperatives, Tourism and Services (ITUFECCTS) and NFCSCT Podkrepa CL in Bulgaria, the Cyprus Hotel and Catering Establishments Employees' Trade Union (SYXKA – PEO) in Cyprus, the Trade Union of Istria, Kvarner and Dalmatia (SIKD) in Croatia, Mandate in Ireland and the Confederation of Christian Unions in Luxembourg – Services & Retail (LCGB Services & Commerce) in Luxembourg. From these, ITUFECCTS and NFCSCT Podkrepa CL in Bulgaria, and SYXKA – PEO in Cyprus, report to have influence as a result of the consultation. In addition, attention should be drawn to the case of Estonia, where EFFAT does not record any affiliation, but which has two organisations involved in collective bargaining.

Table 16 below shows the trade unions affiliated and not affiliated to EFFAT in each country. In the last column we have included those trade unions not affiliated to EFFAT which are involved in collective bargaining and consulted by public authorities in sector-related matters.

Table 16: Sector-related trade unions affiliated to EFFAT

Country	Trade unions affiliated to EFFAT	Trade unions not affiliated to EFFAT	Relevant trade unions not affiliated to EFFAT
AT	GPA-djp, VIDA	-	
BE	ABVV-FGTB Horval, ACLVB-CGSLB, ACV-CSC Voeding en Diensten	-	
BG	-	ITUFECCTS, NFCSCT Podkrepa CL	ITUFECCTS, NFCSCT Podkrepa CL
CY	OYXEKA – SEK	SYXKA – PEO	SYXKA – PEO
CZ	ČMOS PHCR	-	
DE	NGG	-	
DK	3F	-	

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EE	-	EMSA, ETKA	
EL	POEEYTE	-	
ES	CCOO-SERVICIOS, FeSMC – UGT	ELA-ZERBITZUAK, LAB	
FI	PAM	-	
FR	CFDT Services, CFTC CSFV, CGT Commerce, FGTA/FO, INOVA / CFE-CGC	UNSA Commerce et Services	
HR	STUH	SIKD	SIKD
HU	VISZ	-	
IE	SIPTU	Mandate	Mandate
IT	FILCAMS-CGIL, FISASCAT-CISL, UILTUCS-UIL	Manageritalia	
LT	-	-	-
LU	OGBL	LCGB Services & Commerce	LCGB Services & Commerce
LV	LAKRS	-	
MT	GWU	-	
NL	CNV Vakmensen, FNV Horecabond	De Unie	
PL	NSZZ Solidarność	-	
PT	-	FESAHT, SITESE	
SE	HRF, Unionen	-	
SI	Sindikát GiT	SDGiTS KS90, SOPS	
SK	OZ POCR	-	
UK	BFAWU, GMB, Unite the Union	-	

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

As shown in Table 16, in 15 EU Member States (Austria, Belgium, Czech Republic, Germany, Denmark, Finland, Greece, Hungary, Lithuania, Latvia, Malta, Poland, Sweden, Slovakia and the UK) all sector-related trade unions are affiliated to EFFAT.

There are 11 Member States (Bulgaria, Cyprus, Spain, France, Croatia, Ireland, Italy, Luxemburg, the Netherlands, Portugal and Slovenia) where there are some sector-related trade unions represented in the HORECA European sectoral social dialogue committee via their membership of EFFAT, while other sector-related trade unions are not members of EFFAT. As previously explained, only some organisations not affiliated to EFFAT in Bulgaria (ITUFECCCTS and NFCSCCT Podkrepa CL), Cyprus (SYXKA – PEO), Croatia (SIKD), Ireland (Mandate) and Luxembourg (LCGB Services & Commerce in Luxembourg) could be considered particularly

relevant, bearing in mind that they are involved in collective bargaining and also report that they are consulted in sector-related matters.

Finally, there is one country (Estonia) where, although the report has identified relevant associations, EFFAT has no members; and two other countries (Lithuania and Romania) where EFFAT has no affiliation, but the study did not identify national trade unions that met the criteria to be included.

HOTREC membership composition

Table 17 documents a list of membership-related trade unions for HOTREC drawn from the country reports. Again, this membership list is confined to the sector-related associations of the countries under consideration; hence it does not include employer associations affiliated to the European-level organisation which do not have any members in the HORECA sector. The membership of the employer organisations is obtained through the membership list provided by the organisations and a further check of the membership lists published on the organisation's webpages.

Table 17: HORECA employer associations affiliated to HOTREC

Country	Employer organisation	Collective bargaining	Consultation		Influence
AT	FVG	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	Real influence
AT	FVH	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	Real influence
AT	VVAT	No	N.A.	N.A.	No
BE	Ho.Re.Ca Bruxelles	Yes, multi-employer bargaining only	Yes	On a regular basis	Real influence
BE	Horeca Vlaanderen	Yes, multi-employer bargaining only	Yes	On a regular basis	Real influence
BE	Horeca Wallonie	Yes, multi-employer bargaining only	Yes	On a regular basis	Real influence
CZ	AHRČR	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	No
DE	DEHOGA	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	No
DE	IHA	No	Yes	On an ad-hoc basis	Real influence
DK	HORESTA	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	No
EE	EHRL	No	Yes	On an ad-hoc basis	Real influence
EL	HCH	No	Yes	On a regular basis	No
ES	CEHAT	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	No

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ES	FEHR	Yes, multi-employer bargaining only	N.A.	N.A.	No
FI	MaRa	Yes, multi-employer bargaining only	Yes	On a regular basis	Real influence
FR	GNC	Yes, multi-employer bargaining only	No	N.A.	No
FR	GNI	Yes, multi-employer bargaining only	Yes	On a regular basis	Real influence
FR	UMIH	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	No
HR	HUP UUT	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	No
HU	MSZÉSZ	Yes, multi-employer bargaining only	Yes	On a regular basis	Real influence
IE	IHF	No	Yes	On an ad-hoc basis	Real influence
IE	RAI	Yes, single-employer bargaining only	Yes	On an ad-hoc basis	Real influence
IT	Federalberghi	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Real influence
IT	FIPE	Yes, multi-employer bargaining only	Yes	N.A.	No
LT	LVRA	No	Yes	On a regular basis	Real influence
LU	HORESCA	No	Yes	On a regular basis	Real influence
LV	LVRA	Yes, multi-employer bargaining only	Yes	N.A.	Real influence
MT	MHRA	No	Yes	On a regular basis	Real influence
NL	KHN	No	Na.	N.A.	No
PL	IGHP	No	Yes	On an ad-hoc basis	Real influence
SE	Visita	Yes, multi-employer bargaining only	Yes	On a regular basis	No
SI	TGZS	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Real influence
SK	ZHR SR	No	Yes	On a regular basis	Real influence
UK	ALMR	No	Yes	N.A.	No

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Note: N.A. = not available.

HOTREC covers hotels, restaurants and cafés and it does not cover the contract catering sector. It has therefore a congruent domain pattern with regard to the sector. HOTREC has 34 direct affiliations in 24 countries under consideration which fulfil the criteria to be included in this study. Organisations meeting the criteria to be included in the study are those which are sector related, are affiliated to HOTREC and/or are involved in collective bargaining in the sector. HOTREC has no affiliations that meet the criteria to be included in Bulgaria, Cyprus and Portugal. Therefore, 48% of the employer associations listed in Tables A3 and A4 in the annex are directly affiliated to HOTREC. Twenty-two out of the 34 organisations affiliated to HOTREC are involved in sector-related collective bargaining. Regarding their involvement in consultation processes on sector-related matters, all the organisations affiliated to HOTREC except one (the National Association of Hotel Chains (GNC) in France) are consulted. Information on this is not available for the Association of Event Organisers Austria (VVAT) in Austria, FEHR in Spain and KHN in the Netherlands. Moreover, 21 employer associations affiliated to HOTREC report to have influence on policymaking as a result of the consultation.

Once we have analysed HOTREC national affiliations, it is relevant to check if some major national employer associations are not covered. As in the case of EFFAT, it can be assumed that major employer associations are those which conduct collective bargaining and have opportunities to intervene in the national decision-making process.

The analysis of the 37 organisations detected in the study which are not affiliated to HOTREC reveals that all of them are involved in collective bargaining, according to the methodological criteria followed, to select and include sector-related organisations. Regarding their involvement in sector-related public policy, 21 organisations are consulted. From these 21 organisations, 16 also report to have influence as a result of consultation.

Attention should also be drawn to the cases of Bulgaria, Cyprus and Portugal. In these countries, where HOTREC does not record any affiliations, the study has found employer associations which, except in the case of Portugal, are involved in collective bargaining and are consulted by public authorities on sector-related matters. In Portugal, associations included are involved in collective bargaining but information on consultation was not available.

Table 18 below shows the employer associations affiliated and not affiliated to HOTREC in each country. The last column shows those trade unions not affiliated to HOTREC which are involved in collective bargaining and consulted by public authorities in sector-related matters.

Table 18: Sector-related employment organisations affiliated to HOTREC

Country	Employer organisations affiliated to HOTREC	Employer organisations not affiliated to HOTREC	Relevant Employer organisations not affiliated to HOTREC
AT	FVG, FVH, VVAT	-	
BE	Ho.Re.Ca Bruxelles, Horeca Vlaanderen, Horeca Wallonie	BEMORA, UBC (both Bemora and UBC are part of COMEOS)	BEMORA, UBC (both Bemora and UBC are part of COMEOS)
BG	-	BTC	

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CY		OSIKA, PASYXE, STEK	OSIKA, PASYXE, STEK
CZ	AHRČR	-	
DE	DEHOGA, IHA	BdS	BdS
DK	HORESTA	-	
EE	EHRL	-	
EL	HCH	HHF, POESE	POESE
ES	CEHAT, FEHR	CEHRATC, FEADRS	FEADRS
FI	MaRa	AVAINTA, KT	AVAINTA, KT
FR	GNC, GNI	A & T, FNHPA, SNARR, SNRPO, SNRTC	FNHPA, SNRTC
HR	HUP – UUT	-	
HU	MSZÉSZ	VIMOSZ	VIMOSZ
IE	IHF, RAI		
IT	Federalberghi, FIPE	AICA, ANGEM, Assoturismo, Confindustria, FAITA, Federcamping	AICA, ANGEM, Assoturismo, Confindustria, FAITA, Federcamping
LT	LVRA	-	
LU	HORESCA	-	
LV	LVRA		
MT	MHRA	-	
NL	KHN	NHG	
PL	IGHP	-	
PT	-	AHETA, AHP, AHRESP, AIHSA, APHORT	
RO	-	-	
SE	Visita	Almega, LI, Svensk Handel	
SI	TGZS	SGT OZS, ZDOPS, ZDS	SGT OZS, ZDS
SK	ZHR SR	-	
UK	ALMR	-	

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

In eight EU Member States, all sector-related employer organisations are affiliated to HOTREC. This is the case in Austria, Czech Republic, Denmark, Estonia, Croatia, Ireland, Lithuania, Latvia and Slovakia.

In three EU Member States (Bulgaria, Cyprus and Portugal) there are employers organisations that meet the criteria to be included in the study, but none of them is affiliated to HOTREC.

In eleven EU Member States, there are both member organisations of HOTREC and other organisations not affiliated to HOTREC. As previously noted, in Belgium, Cyprus, German, Spain, Finland, France, Greece, Hungary, Italy and Slovenia, some of the organisations not affiliated to HOTREC could be considered relevant bearing in mind that they are both involved in sector-related collective bargaining and public consultation on sector-related matters.

Finally, it is worth noting that, since its last General Assembly held in Vienna on 26 April 2018, HOTREC has two new members in the EU Member States: ZPHoReCa in Poland and Gremi d'Hotels de Barcelona in Spain. As this happened after the notational contributions elaborated by the Network of Eurofound correspondents had been finished and evaluated by national social partners, neither organisation has been included in the study. Based on this, HOTREC is currently affiliating 36 out of 73 organisations meeting the criteria to be included (49% instead of 48%)

Capacity to negotiate

The European sectoral social partners should be able to prove their capacity to negotiate on behalf of their members and to enter into 'contractual relations, including agreements' (Article 155 TFEU); that is, they should have the capacity to commit themselves and their national affiliates. This criterion only refers to the capacity to negotiate agreements as provided for in Article 155 TFEU; negotiating other types of joint texts such as joint opinions, frameworks for action and guidelines is not considered to be sufficient in this context.

A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates, or if it can receive such a mandate in accordance with a given mandating procedure.

The mandate/mandating procedure can either be statutory, i.e. laid down in the statutes (constitution) of the organisation or annexed to them, or non-statutory, i.e. laid down in secondary (formal) documents, such as rules of procedures, memoranda of understanding or decisions by the governing bodies of the organisation. The mandate will be described in terms of the conditions and procedure for the European social partner organisation to be given the authorisation to enter into a specific negotiation, as well as for the ratification of a possible agreement. If no such formal mandating procedure can be identified, it should be considered that the condition concerned is not fulfilled.

In order to check this criterion, European social partners from HORECA were asked to respond to a written questionnaire, describing the agreements or texts achieved (Table 19), their mandate and capacity to negotiate, as well as the ratification procedures in place.

As seen in Table 19, the European sectoral social dialogue committee of the HORECA sector has mainly produced joint statements, declarations and recommendations to the EU with a view to influencing general policy direction. In addition, EFFAT and HOTREC have also produced rules of procedures or 'process-oriented texts' that include the agreement in the framework of their social dialogue at European level (1998). Binding agreements have not been achieved so far.

Table 19: Texts and agreements for HORECA between EFFAT and HOTREC

Year	Agreed texts
2015	Joint EFFAT-HOTREC Statement on the ‘Sharing Economy’
2013	European Qualification and Skills Passport (QSP) in the Hospitality Sector - QSP skills list
2010	Joint EFFAT-HOTREC Statement on Undeclared Work in the European Hotel and Restaurant Sector
2008	Joint EFFAT-HOTREC Statement on the continuation of the work on the European qualification and skills passport
2005	Joint EFFAT-HOTREC Opinion Young people and the hospitality sector – contribution to the Youth initiative
2004	Joint EFFAT-HOTREC Recommendation: Guidelines for training and development, especially in SMEs, in the hotel, restaurant and café sector
2004	EFFAT-HOTREC Initiative for improving Corporate Social Responsibility (CSR) in the hospitality sector
2002	EFFAT-HOTREC Joint Declaration on EU-Enlargement
1998	ECF-IUF - HOTREC Agreement on the Framework of their Social Dialogue at European Level
1995	Joint ECF-IUF - HOTREC Declaration Principles and guidelines for maintaining and developing tourism jobs in rural areas
1995	Joint ECF-IUF - HOTREC Declaration Flexibility of Labour and Organisation of Working Time - Part-time Work and the Creation of Jobs
1994–1997	Joint ECF-IUF - HOTREC declaration on the effects of VAT on business and employment in the hotel, restaurant and café sector

The analysis of both European social partners organisations’ legal statutes regarding their capacity/mandate to negotiate is presented below.

HOTREC’s statutes state that the President of the organisation will sign all acts which bind it. The statutes also provide for a General Assembly and an Executive Committee. It appears that the Executive Committee, which meets twice a year, is supposed to decide on European Social Partner texts or agreements. Such decisions can be taken when at least five members are present, by a simple majority (Article 7–J of the HOTREC statutes).

As an example of how the mandating and decision making within HOTREC works, regarding European social dialogue texts or actions, this will be illustrated with the example of the last 2016 joint pledge to enhance the quality and attractiveness of apprenticeship schemes.

The process towards this joint pledge started when HOTREC held a meeting on July 2015 with EAFA Commission representatives. As a follow-up, HOTREC proposed to EFFAT that they should join the Alliance together and submit a joint pledge. In the 10 October 2015 meeting of the HORECA European sectoral social dialogue committee, the draft text of this joint pledge was finalised. For HOTREC, its delegation in the European sectoral social dialogue committee holds the responsibility to discuss and decide on all matters dealing with social affairs. The HOTREC Executive Committee was informed on 4 November 2015 and subsequently agreed with the

decision of the European sectoral social dialogue committee. On the HOTREC General Assembly meeting of 5-6 November 2015, the joint pledge was also presented.

In fact, after the decision at the European sectoral social dialogue committee, there is no formal endorsement done on the basis of the first drafts. Different drafts are not approved several times in Executive Committee or General Assembly; what is important is that the main message is approved, after which small amendments can be made until the final text is agreed upon in the European sectoral social dialogue committee. In every general assembly, the HOTREC secretariat reports to its members on the activities developed by the European sectoral social dialogue committee. All related relevant documents are published both on the members' site and General Assembly page. HOTREC holds two general assembly meetings per year. Decisions are taken in the European sectoral social dialogue committee; the HOTREC Executive Committee and General Assembly only approve decisions already taken in the European sector social dialogue committee.

After the pledge was signed all HOTREC members were informed through the HOTREC members' webpage.

EFFAT has, according to its statutes, seven governing bodies: its Congress, its Executive Committee, its Management Committee, Sector Assemblies and Sector Boards, its Secretariat, the Auditing Committee and a Constitution Committee.

In the EFFAT constitution there is a reference to EFFAT's mandate to negotiate on behalf of its members. According to chapters IV & V, the Congress is the supreme body of EFFAT, and between congresses the Executive Committee is the political supreme body of EFFAT.

'The executive committee will decide on the composition and the mandate of the delegation entrusted with negotiations with the European employers' associations (...) Decisions on the outcomes of negotiations shall be taken by the executive committee. The decisions shall have the support of at least two thirds of the organisation directly concerned by the negotiations which shall have had the opportunity to hold internal consultations'.

(EFFAT 2009).

Hence, EFFAT has a statutory mandate by its members to negotiate including agreements.

The EFFAT Management Committee is given the task of supervising and preparing the negotiations regarding management of transnational companies and European employers' associations.

Practically, when a new issue comes up in the social dialogue, the decision to start working on it is taken in the European sectoral social dialogue committee plenary meetings. Subsequently, the social partners' secretariats are mandated to elaborate and make a first draft, which is discussed at the steering group for the European sectoral social dialogue committees. The final documents are then normally adopted by the annual European sectoral social dialogue committee plenary meeting.

According to the EFFAT Constitution, the sector assemblies are responsible for decisions upon the results of sectoral negotiations. As the Tourism General Assembly only takes place once a year, consultation is mostly done in writing. Once a draft text is ready, all concerned EFFAT members are consulted via email, asking member organisations for comments, amendments or approval by a given deadline. The whole of EFFAT is regularly informed about activities in the

sector through activity reports at the biannual EFFAT Executive Committee meetings. The Executive Committee thus endorses the results by taking note of the reports. For Congress, the sectors prepare activity reports, also mentioning the results from the European sectoral social dialogue committee and attaching relevant documents. Outcomes of social dialogue activities are sent to all member organisations, often via a notification with a link to the EFFAT website, where documents can be downloaded. They are also subject to mention in EFFAT publications such as the monthly EFFAT Newsletter. The wider public is informed about significant European sectoral social dialogue committee achievements via press releases or on the EFFAT website.

Effective participation in the European sectoral social dialogue committee

Looking at the effective participation in the European sectoral social dialogue committee for the HORECA sector over the years 2016 and 2017, there were representatives involved from trade unions from 15 EU Member States and from employer organisations from 14 EU Member States.

Trade union participation in the European sectoral social dialogue committee for the HORECA sector in 2016–2017, from the following EU Member States	AT, CY, DK, EL, ES, FI, FR, HR, HU, IE, IT, PL, SE, SI, UK
Employers participation in the European sectoral social dialogue committee for the HORECA sector in 2016–2017, from the following EU Member States	AT, BE, DK, ES, FI, FR, HU, IE, IT, LT, LV, MT, PL, SE

Source: Eurofound and European Commission

Member organisations that were not directly represented in meetings of the European sectoral social dialogue committee are normally kept informed about developments in the committee via their participation in the meetings of statutory bodies of their European organisation, or via its intranet or website.

Other European organisations

As final proof of the weight of the European social partners analysed, it is useful to look at the other European organisations to which the sector-related trade unions and employer organisations are affiliated.

The affiliations of the trade unions are listed in Table A2 (Annex 1), with several European organisations other than EFFAT. According to the bottom-up approach, there are three European organisations mentioned here, which cover at least three countries:

- The European Public Service Union (EPSU) (seven countries)
- UNI Europa (eight countries).
- European Transport Federation (ETF) (six countries)

It is worth noting that the bottom-up approach can be expected to underestimate the number of organisations affiliated to European trade unions. According to the information provided in the organisations' websites, they are present in more countries than the bottom-up approach may suggest. The presence of EPSU, UNI Europa and ETF reflect the overlapping domains of many trade unions, because these organisations do not claim to attract unions belonging to the HORECA sector.

The affiliations of the employer associations are listed in Table A4 (Annex 1). According to the bottom-up approach, there are two European organisations mentioned here which cover at least

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three countries. It is worth noting that this analysis excludes European cross-sectoral organisations such as Business Europe or UEAPME as they are expected to compete with HOTREC. The two sectoral organisations identified are:

- EuroCommerce (four countries)
- European Federation of Camping site Organisations and Holiday Park Associations (EFCO&HPA) (three countries)

Again, the bottom-up approach can be expected to underestimate the number of organisations affiliated to European employer associations. According to the information provided in the organisations' websites, they are present in more countries than the bottom-up approach may suggest. The presence of Euro Commerce reflects the overlapping domains of some employer associations, because this organisation does not claim to attract employer associations belonging to the HORECA sector. EFCO&HPA is sector-related as it covers part of the accommodation sector; camping grounds, recreational vehicle parks and trailer parks (NACE 56.30). According to its website, this organisation has affiliations in 23 European countries, although, according to bottom up data collection, this study only detected affiliates in three EU member states.

EFCO is complementary to HOTREC in terms of representativeness to HOTREC (not a competitor). EFCO represents the interest of camping site businesses as employers, while HOTREC represents the interest of hotel and similar establishments' businesses as employers. On the market, of course, there is some degree of competition between EFCO and HOTREC for tourists; however, in this case, also, both are serving different types of demand and hence can also be mainly regarded as complementary. In terms of figures, there are over 154,000 hotel and similar enterprises in Europe, while there are around 16,000 enterprises running camping grounds and similar facilities. In terms of employment, hotels and similar establishments employ almost 2.2 million people, while camping sites employ 102,000 people.

Bed places	Arrivals	Nights spent
Hotels and similar (NACE 55.1): 13.8 million	Hotels and similar: 748 million	Hotels: 1879 million
Campsites and similar (NACE 55.3): 9.9 million	Camping: 84 million	Camping: 378 million

Source: Information provided by Eurostat (November 2018).

5. Conclusions

The HORECA sector (NACE codes 55 and 56) employed 10,555,500 people in 2016, representing around 5% of total employment in the European Union, according to the Eurostat European Labour Force Survey. Food and beverage service activities is the biggest subsector, accounting for 75% of total HORECA employment. Women account for 54% of the total workforce. The enterprise size structure of HORECA is mainly made up of small businesses. According to the Structural Business Statistics, 85% of the companies in the accommodation sector and 90% in the food and beverage service activities employed fewer than 10 employees in 2015.

The HORECA sector is particularly relevant in countries such as Greece (9.3%), Spain (8.7%), Cyprus (8.7%), Ireland (7.2%), Malta (6.8%), Croatia (6.8%), Italy (6.1%), Austria (6%), Portugal (5.8%), the UK (5.4%) and Bulgaria (5.1%). In most of these countries, tourism is one of the main industries and the relevance of the HORECA sector may be explained as a result of its close relationship with this industry.

The study has identified a total of 55 sector-related trade unions in 26 EU Member States and 71 sector-related employer organisations in 27 EU Member States. On the employer side, no employer organisation met the criteria for being included in Romania. On the employee side, no trade unions met the criteria to be included in the study in Lithuania and Romania.

The analysis of the trade unions has showed that most of them have a 'sectionalism' and 'sectionalism overlap' domain. Thus, they tend to cover activities outside the HORECA sector. In this sense, the study has found that 49 out of the 55 trade unions identified also cover contract catering. In terms of their involvement in collective bargaining and consultation, the study has found that all the trade unions are involved in sector-related collective bargaining but only 27 trade unions out of 36 with available information report that they are consulted by government in sector-related matters.

The analysis of the employer organisations has showed that, in contrast to the trade unions, 'sectionalism' is the most widespread domain among them, occurring in 25 cases (36%). At the same time, there are 43 organisations that have a 'sectionalism' and 'sectionalism overlap' domain. Most (38) of these organisations cover the contract catering sector (NACE 56.29).

With regard to the system of collective bargaining, the study has found that there is no sector-related collective bargaining in Lithuania, Latvia and Romania. For the remaining countries, three different groups can be identified. Firstly, a group of eight countries that record collective bargaining coverage rates higher than 80%: Austria, Belgium, Finland, France, Croatia, Hungary, Italy and Portugal. In these countries, multi-employer is the main bargaining level, prevailing in terms of workers covered. Secondly, a small group of three countries (Denmark, Spain and Sweden) with record collective bargaining coverage rates that oscillate between 60% and 70%. Finally, a third group of 11 countries record rates of collective bargaining coverage lower than 35%. In Cyprus, Czech Republic, Germany, the Netherlands and Slovenia, collective bargaining is mainly carried out at multi-employer level. While in Slovenia there is an extension mechanism in place, there is no such mechanism in Cyprus, Czech Republic or Germany. In the Netherlands, the sectoral collective agreement for the HORECA sector was excepted from this practice. In the remaining six countries (Estonia, Luxembourg, Malta, Poland, Slovakia and the UK), collective bargaining is mainly or exclusively carried out at company level.

Table 20: Membership structure

	Number of organisations	Number of Member States with organisations	Number of organisations involved in collective bargaining	Number of Member States with organisations involved in collective bargaining
All sector-related trade unions	55	26	55	26
Affiliates to EFFAT	37	23	37	23
Percentage affiliated	67%	88%	67%	88%
All sector-related employer organisations	71	27	59	19
Affiliates to HOTREC	34	24	22	15
Percentage affiliated	48%	89%	37%	79%

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Regarding the analysis of the European social partners, top-down and bottom-up analyses of HORECA sector in the 28 EU Member States show that EFFAT on the employee side and HOTREC on the employer side are the most important European-level social partners organisations within HORECA, based on their membership.

As shown in Tables 20 and 21, EFFAT has 37 direct affiliations in 23 countries under consideration which fulfil the criteria to be included in this study (66%). All these organisations are involved in sector-related collective bargaining and 22 of them are also consulted in relation to sector-related matters. EFFAT also has a statutory mandate to negotiate joint texts and agreements on behalf of its members.

Tables 20 and 22 show that HOTREC has 34 direct affiliations in 24 countries under consideration which fulfil the criteria to be included in this study (48%). Of these, 22 organisations are involved in sector-related collective bargaining and 30 are involved in the consultation process on sector-related matters. HOTREC also has a statutory procedure to decide on European Social Partner texts or agreements on behalf of its members.

In the course of 2018, HOTREC added two new member organisations: ZPHoReCa in Poland and Gremi d'Hotels de Barcelona in Spain. As this happened after the notational contributions elaborated by the Network of Eurofound correspondents had been finished and evaluated by national social partners, neither organisation has been included in the study. Based on this, HOTREC is currently affiliating 36 out of 73 organisations meeting the criteria to be included (49% instead of 48%)

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This study concludes that EFFAT (representing the employees) and HOTREC (representing the employers) are the most representative European-level social partner organisations in the HORECA sector.

Table 21: EFFAT representativeness

<p>EFFAT covers:</p> <ul style="list-style-type: none"> • 37 direct affiliations in 23 countries under consideration which fulfil the criteria to be included into this study (66%) • 37 trade unions involved in sector-related collective bargaining • 21 organisations that are consulted on sector-related matters • all the subsectors included in our sectoral definition through their national affiliations 	<p>EFFAT does not represent:</p> <ul style="list-style-type: none"> • any trade union in Bulgaria, Estonia, Lithuania, Portugal or Romania • 18 organisations which are involved in sector-related collective bargaining • six trade unions which are involved in collective bargaining and consulted by public authorities in sector-related matters in Bulgaria, Cyprus, Croatia, Ireland and Luxembourg
<p>There is no other European Trade Union organisation in the HORECA sector</p>	
<p>CAPACITY TO NEGOTIATE</p>	

Table 22: HOTREC representativeness

<p>HOTREC covers:</p> <ul style="list-style-type: none"> • 34 direct affiliations in 24 countries under consideration which fulfil the criteria to be included into this study (48%) • 22 organisations involved in sector-related collective bargaining • 30 organisations involved in the consultation process on sector-related matters • 21 employer associations that report to have an influence on policymaking as a result of the consultation • all the subsectors included in our sectoral definition through their national affiliations 	<p>HOTREC does not represent:</p> <ul style="list-style-type: none"> • any employer association in Bulgaria, Cyprus, Portugal or Romania • 37 organisations which are involved in sector-related collective bargaining • 21 organisations which are involved in both collective bargaining and public consultation on sector-related matters • 16 organisations that report to have an influence as a result of the consultation
<p>There is one other EU-level organisation in a minor subsection of the HORECA sector. EFCO&HPA claims to have affiliations in 23 European countries (according to its website). This organisation covers part of the accommodation subsector.</p> <p>HOTREC is the only European employers' organisation covering the entire HORECA sector, as defined in this study.</p>	
<p>CAPACITY TO NEGOTIATE</p>	

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Annex 1: Details of individual organisations

Trade unions

Table 23: Domain coverage and membership of trade unions in the HORECA sector, 2017

	Trade union	Domain coverage	Type of membership	Active members total	Active members in sector	Members in largest companies
AT	GPA-djp	Sectionalism overlap	Voluntary	255,000	1,500	Yes
AT	VIDA	Sectionalism overlap	Voluntary	100,000	9,000	Yes
BE	ABVV-FGTB Horval	Overlap	Voluntary	N.A.	35,000	Yes
BE	ACLVB-CGSLB	Overlap	Voluntary	294,000	7,000	Yes
BE	ACV-CSC Voeding en Diensten	Overlap	Voluntary	261,968	27,500	Yes
BG	ITUFECCTS	Sectionalism overlap	Voluntary	3,176	510	N.A.
BG	NFCSCT Podkrepa CL	Sectionalism	Voluntary	2,800	500	Yes
BG	STB	N.A.	Voluntary	N.A.	N.A.	N.A.
CY	OYXEKA – SEK	Overlap	Voluntary	1,045	14,015	Yes
CY	SYXKA – PEO	Overlap	Voluntary	11,296	11,194	Yes
CZ	ČMOS PHCR	Overlap	Voluntary	412	N.A.	Yes
DE	NGG	Overlap	Voluntary	201,623	40,000	Yes
DK	3F	Sectionalism overlap	Voluntary	237,857	N.A.	Yes
EE	EMSA	Overlap	Voluntary	2,549	178	Yes
EE	ETKA	Sectionalism overlap	Voluntary	1,300	N.A.	No
EL	POEEYTE	Overlap	Voluntary	2,500	24,300	Yes
ES	CCOO-SERVICIOS	Overlap	Voluntary	N.A.	N.A.	Yes
ES	ELA-ZERBITZUAK	Sectionalism overlap	Voluntary	26142	N.A.	No
ES	FeSMC –UGT	Overlap	Voluntary	N.A.	N.A.	Yes
ES	LAB	Sectionalism Overlap	Voluntary	N.A.	N.A.	N.A.
FI	PAM	Overlap	Voluntary	151,000	31,800	Yes
FR	CFDT Services	Overlap	Voluntary	85,000	N.A.	Yes
FR	CFTC CSFV	Overlap	Voluntary	N.A.	N.A.	N.A.

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FR	CGT Commerce	Overlap	Voluntary	45,000	N.A.	Yes
FR	FGTA/FO	Overlap	Voluntary	N.A.	N.A.	Yes
FR	INOVA / CFE-CGC	Overlap	Voluntary	N.A.	N.A.	N.A.
FR	UNSA Commerce et Services	Overlap	Voluntary	N.A.	N.A.	N.A.
HR	SIKD	Overlap	Voluntary	6,000	2,000	Yes
HR	STUH	Overlap	Voluntary	5,200	5,000	Yes
HU	VISZ	Overlap	Voluntary	192,800	20,000	Yes
IE	Mandate	Sectionalism overlap	Voluntary	40,000	N.A.	No
IE	SIPTU	Sectionalism overlap	Voluntary	180,000	N.A.	Yes
IT	FILCAMS-CGIL	Overlap	Voluntary	469,334	N.A.	Yes
IT	FISASCAT-CISL	Sectionalism overlap	Voluntary	351,346	N.A.	Yes
IT	Manager-italia	Sectionalism overlap	Voluntary	35,000	N.A.	N.A.
IT	UILTUCS-UIL	Sectionalism overlap	Voluntary	125,825	31,456	Yes
LU	LCGB Services & Commerce	Overlap	Voluntary	8,000	2,000	N.A.
LU	OGBL	Overlap	Voluntary	12,000	3,500	Yes
LV	LAKRS	Overlap	Voluntary	5,985	530	N.A.
MT	GWU	Overlap	Voluntary	41,921	2,800	Yes
NL	CNV Vakmensen	Overlap	Voluntary	160,000	7,000	Yes
NL	De Unie	Overlap	Voluntary	30,000	N.A.	N.A.
NL	FNV Horecabond	Overlap	Voluntary	24,050	22,700	Yes
PL	NSZZ Solidarność	Overlap	Voluntary	60,000	900	Yes
PT	FESAHT	Overlap	Voluntary	25,000	17,000	Yes
PT	SITese	Sectionalism overlap	Voluntary	10,000	N.A.	N.A.
SE	HRF	Sectionalism overlap	Voluntary	31,000	31,000	Yes
SE	Unionen	Sectionalism overlap	Voluntary	537,711	7,150	Yes
SI	SDGITS KS90	Sectionalism overlap	Voluntary	25,000	N.A.	Yes
SI	Sindikar GIT	Overlap	Voluntary	5,000	5,000	Yes
SI	SOPS	Sectionalism overlap	Voluntary	200	200	No
SK	OZ POCHR	Overlap	Voluntary	11,000	200	Yes
UK	BFAWU	Sectionalism overlap	Voluntary	19,070	N.A.	Yes
UK	GMB	Sectionalism overlap	Voluntary	617,213	N.A.	Yes

Representativeness of the European social partner organisations: Hotels, restaurants and café (HORECA) sector

UK	Unite the Union	Sectionalism overlap	Voluntary	1,282,671	N.A.	N.A.
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Note: N.A. = not available; data on active members in the sector also takes contract catering into account for most of the trade unions

Table 24: Collective bargaining, consultation and affiliations of trade unions in the HORECA sector, 2017

	Trade union	Collective bargaining	Consultation		National, European and international affiliations
			Yes	On an ad-hoc basis	
AT	GPA-djp	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	ÖGB, industriAll, ETUC, EPSU, EFFAT, EFJ, UNI Europa, industriAll Global Union, ITUC-CSI-IGB, UNI global union, WOW
AT	VIDA	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	ÖGBETF, EFFAT, EPSU, UNI Europa, ITF, UNI global union, IUF-UITA-IUL, PSI
BE	ABVV-FGTB Horval	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	ABVV-FGTBEFFAT, ETUC, UIF
BE	ACVLVB-CGSLB	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	EFFAT, ETUCUIF
BE	ACV-CSC Voeding en Diensten	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	ACV-CSC, EFFAT, ETUC, UIF
BG	ITUFECCTS	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	CITUB
BG	NFCSCT Podkrepa CL	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	CL Podkrepa, EPSU, PSI
BG	STB	Yes, multi-employer bargaining only	N.A.	N.A.	CITUBIUF
CY	OYXEKA – SEK	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	SEKEFFAT, IUF
CY	SYXKA – PEO	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	PEO, HOTOURL-TUI
CZ	ČMOS PHCR	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	ČMKOS, EFFAT
DE	NGG	Yes, both single- and	Yes	On an ad-	DGB, EFFAT, IUF

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		multi-employer bargaining		hoc basis	
DK	3F	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	CO-industri, LO, EFFAT - ETF, NTF, UNI Europa, EFBWW, EPSU, Industry All Europe, ITF, PSI, UNI-Global, BWI, IndustryAll, IUF
EE	EMSA	Yes, single-employer bargaining only	No	N.A.	ETF
EE	ETKA	Yes, single-employer bargaining only	No	N.A.	Estonian Trade Union Confederation, Open Education Association, Uni Commerce Europe, UNI Global UNI
EL	POEEYTE	Yes, multi-employer bargaining only	No	N.A.	EFFAT, IUF
ES	CCOO-SERVICIOS	Yes, both single- and multi-employer bargaining	No	N.A.	CCOO, EFFAT, Uni Europea, UITA, Uni Global ; IUF
ES	ELA-ZERBITZUAK	Yes, both single- and multi-employer bargaining	N.A.	N.A.	None
ES	FeSMC - UGT	Yes, both single- and multi-employer bargaining	N.A.	N.A.	UGT, EFFAT
ES	LAB	Yes, multi-employer bargaining only	N.A.	N.A.	None
FI	PAM	Yes, multi-employer bargaining only	Yes	On a regular basis	SAK, EFFAT, UNI Europa, UNI Global
FR	CFDT Services	Yes, both single- and multi-employer bargaining	N.A.	N.A.	Confédération Française démocratique du Travail, EFFAT, UNI Europa, IUF, UNI Global Union
FR	CFTC CSFV	Yes, both single- and multi-employer bargaining	N.A.	N.A.	Confédération des Travailleurs Chrétiens, EFFAT, IUF
FR	CGT Commerce	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Confédération générale du travail, EFFAT, UNI Europa, IUF, UNI Global Union
FR	FGTA/FO	Yes, both single- and multi-employer bargaining	No	N.A.	Confédération générale du travail, EFFAT, IUF
FR	INOVA / CFE-CGC	Yes, both single- and multi-employer bargaining	N.A.	N.A.	Confédération Générale de l'Encadrement-Confédération générale des cadre, EFFAT
FR	UNSA Commerce et Services	Yes, single-employer bargaining only	N.A.	N.A.	UNSA

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HR	SIKD	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	ITUC
HR	STUH	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	The Union of Autonomous Trade Union of Croatia, EFFAT, IUF
HU	VISZ	Yes, multi-employer bargaining only	Yes	On a regular basis	LIGA Szakszervezetek, EFFAT, IUF
IE	Mandate	Yes, single-employer bargaining only	Yes	On an ad-hoc basis	ICTU, UNI Europa
IE	SIPTU	Yes, single-employer bargaining only	Yes	On an ad-hoc basis	UNI Europa, EFFAT
IT	FILCAMS-CGIL	Yes, both single- and multi-employer bargaining	N.A.	N.A.	UNI – EUROPA, EFFAT, UNI Global, IUF, UITA
IT	FISASCAT-CISL	Yes, multi-employer bargaining only	N.A.	N.A.	CISLUNI – EUROPA, EFFAT, ETLC, UNI Global, IUF UITA, ITF
IT	Manageritalia	Yes, multi-employer bargaining only	N.A.	N.A.	CIDA
IT	UILTUCS-UIL	Yes, both single- and multi-employer bargaining	No	N.A.	UILUNI-EUROPA, EFFAT, UNI GLOBAL UNION, UITA
LU	LCGB Services & Commerce	Yes, single-employer bargaining only	Yes	N.A.	LCGB, UNI Europa, UNI Global Union
LU	OGBL	Yes, single-employer bargaining only	Yes	On an ad-hoc basis	OGBL, EFFAT;UIL
LV	LAKRS	Yes, multi-employer bargaining only	Yes	On a regular basis	LBASEPSU, ETF, EFFAT, Uni Europa, PSI, ITF, IUF, EFFAT, UNI Global Union
MT	GWU	Yes, single-employer bargaining only	Yes	On a regular basis	ETUC, ETF, EFFAT, EPSU, ETUF-TCL, IndustriALL, EMCEF, Uni Europa, EURO WEA, FERPA, SCECBU, ITUC, ITF, IUF, PSI, ITGLWF, UNI, IFWEA
NL	CNV Vakmensen	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	CNV Vakcentrale, EFFAT, UniEuropa, UniGlobal, ITUC, via CNV Vakcentrale
NL	De Unie	Yes, multi-employer bargaining only	N.A.	N.A.	N.A.
NL	FNV Horecabond	Yes, multi-employer bargaining only	N.A.	N.A.	FNV EFFAT
PL	NSZZ Solidarność	Yes, single-employer bargaining only	No	N.A.	EFFAT

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PT	FESAHT	Yes, both single- and multi-employer bargaining	N.A.	N.A.	CGTP-IN
PT	SITese	Yes, multi-employer bargaining only	N.A.	N.A.	UGTUNI-Europa
SE	HRF	Yes, multi-employer bargaining only	Yes	On a regular basis	LO, EFFAT, IUF
SE	Unionen	Yes, multi-employer bargaining only	N.A.	N.A.	TCO, EFFAT, IUF
SI	SDGiTS KS90	Yes, both single- and multi-employer bargaining	N.A.	N.A.	Konfederacija sindikatov 90 Slovenije
SI	Sindikat GiT	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	ZSSS, EFFAT, IUF
SI	SOPS	Yes, multi-employer bargaining only	No	N.A.	ZSSS
SK	OZ POCHR	Yes, single-employer bargaining only	Yes	On a regular basis	KOZ SREFFATUNI Global
UK	BFAWU	Yes, single-employer bargaining only	N.A.	N.A.	TUC, EFFAT
UK	GMB	Yes, single-employer bargaining only	N.A.	N.A.	TUC, ICTU, EFFAT, IndustriALL, Uni-Europa, EPSU, ETF, EFBWW; IUF, IndustriALL Global, BWI, ITF, PSI, UNI
UK	Unite the Union	Yes, single-employer bargaining only	N.A.	N.A.	TUC, ICTU; EFFAT, IndustriALL, Uni-Europa, EPSU, ETF, EFBWW; IUF, IndustriALL Global, BWI, ITF, PSI, UNI

Note: N.A.= not available

Employer organisations

Table 25: Domain coverage and membership of employer organisations in the HORECA sector, 2017

Country	Employer organisation	Domain coverage	Type of membership	Companies total	Companies in the sector	Employees total	Employees in the sector	Largest companies
AT	FVG	Sectionalism overlap	Compulsory	41,922	41,922	150,196	150,196	Yes
AT	FVH	Sectionalism overlap	Compulsory	16,000	16,000	90,000	90,000	Yes
AT	VVAT	Sectionalism overlap	Voluntary	55,000	52,000	200,000	180,000	N.A.
BE	Ho.Re.Ca Bruxelles	Sectionalism	Voluntary	3,750	3,750	N.A.	N.A.	Yes
BE	Horeca Vlaanderen	Sectionalism	Voluntary	5,986	5,986	N.A.	N.A.	Yes
BE	Horeca Wallonie	Sectionalism	Voluntary	N.A.	N.A.	N.A.	N.A.	Yes
BE	BEMORA (by COMEOS)	Sectionalism overlap	Voluntary	14	N.A.	N.A.	N.A.	Yes
BE	COMEOS	Overlap	Voluntary	600	N.A.	400,000	N.A.	Yes
BE	UBC (part of COMEOS)	Sectionalism overlap	Voluntary	N.A.	N.A.	N.A.	8,500	Yes
BG	BTC	N.A.	Voluntary	31	N.A.	30,000	N.A.	N.A.
CY	OSIKA	Sectionalism	Voluntary	2,000	2,000	9,000	9,000	Yes
CY	PASYXE	Sectionalism	Voluntary	292	292	8,000	8,000	Yes
CY	STEK	Sectionalism overlap	Voluntary	55	35	N.A.	4,000	No
CZ	AHRČR	Overlap	N.A.	1,500	1,390	60,000	N.A.	Yes
CZ	SOCR	Overlap	Voluntary	1,500	N.A.	500,000	N.A.	N.A.
DE	BdS	Sectionalism overlap	Voluntary	812	812	100,000	100,000	Yes
DE	DEHOGA	Overlap	Voluntary	65,000	65,000	N.A.	N.A.	Yes
DE	IHA	Sectionalism	Voluntary	1,130	1,130	N.A.	N.A.	Yes
DK	HORESTA	Overlap	Voluntary	2,000	2,000	60,000	60,000	Yes
EE	EHRL	Overlap	Voluntary	212	170	N.A.	4,000	Yes
EL	HCH	Sectionalism	Compulsory	9,730	9,730	144,490	144,490	N.A.

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EL	HHF	Sectionalism	Voluntary	6,500	6,500	N.A.	N.A.	Yes
EL	POESE	Sectionalism	Voluntary	25,000	25,000	N.A.	N.A.	Yes
ES	CEHAT	Sectionalism	Voluntary	16,000	16,000	250,000	250,000	Yes
ES	CEHRATC	Sectionalism	Voluntary	N.A.	N.A.	N.A.	N.A.	N.A.
ES	FEADRS	Sectionalism overlap	Voluntary	100	100	100,000	100,000	Yes
ES	FEHR	Sectionalism overlap	Voluntary	280,000	280,000	1,600,000	1,600,000	Yes
FI	AVAINTA	Overlap	Voluntary	650	10	37,000	1,860	No
FI	KT	Sectionalism overlap	Voluntary	N.A.	N.A.	N.A.	10,100	No
FI	MaRa	Overlap	Voluntary	2,666	2,160	70,000	60,000	Yes
FR	A & T	Sectionalism	Voluntary	605	605	4,810	4,810	No
FR	FNHPA	Sectionalism	Voluntary	3,900	3,900	N.A.	N.A.	N.A.
FR	GNC	Sectionalism	Voluntary	930	930	38,386	38,386	Yes
FR	GNI	Sectionalism	Voluntary	9,871	9,871	119,014	119,014	No
FR	SNARR	Sectionalism	Voluntary	1,900	1,900	105,000	105,000	Yes
FR	SNRPO	Sectionalism	Voluntary	7	7	17,662	17,662	Yes
FR	SNRTC	Sectionalism	Voluntary	1,019	1,019	39,700	39,700	No
FR	UMIH	Overlap	Voluntary	30,762	N.A.	188,705	N.A.	Yes
IE	IHF	Sectionalism	Voluntary	750	750	57,000	57,000	Yes
IE	RAI	Sectionalism	Voluntary	2,500	2,500	N.A.	N.A.	N.A.
IT	ANGEM	Sectionalism overlap	Voluntary	13	13	23,618	23,618	No
IT	Assoturismo	Sectionalism overlap	Voluntary	60,000	N.A.	300,000	N.A.	No
IT	Confindustria AICA	Sectionalism overlap	Voluntary	2,500	2,500	70,000	70,000	No
IT	FAITA Federcamping	Sectionalism	Voluntary	N.A.	N.A.	N.A.	N.A.	No
IT	Federalberghi	Sectionalism overlap	Voluntary	20,500	20,500	225,000	225,000	No
IT	FIPE	Sectionalism overlap	Voluntary	N.A.	N.A.	N.A.	N.A.	No
LT	LVRA	Overlap	Voluntary	320	290	11,000	N.A.	Yes
LU	HORESCA	Overlap	Voluntary	1,700	1,700	15,120	15,120	Yes
LV	LVRA	Overlap	Voluntary	457	402	N.A.	N.A.	Yes

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MT	MHRA	Sectionalism	Voluntary	385	385	N.A.	N.A.	No
NL	KHN	Congruence	Voluntary	20,000	20,000	255,000	255,000	N.A.
NL	NHG	N.A.	N.A.	600	600	N.A.	N.A.	N.A.
PL	IGHP	Sectionalism overlap	Voluntary	300	280	15,000	N.A.	N.A.
PT	AHETA	Sectionalism overlap	Voluntary	N.A.	N.A.	N.A.	N.A.	Yes
PT	AHP	Sectionalism	Voluntary	600	600	N.A.	N.A.	Yes
PT	AHRESP	Sectionalism overlap	Voluntary	25,000	N.A.	100,000	N.A.	No
PT	AIHSA	Sectionalism overlap	Voluntary	2,000	N.A.	N.A.	N.A.	No
PT	APHORT	Overlap	Voluntary	N.A.	N.A.	N.A.	N.A.	No
SE	Almega	Sectionalism overlap	Voluntary	2,500	300	83,000	N.A.	N.A.
SE	LI	Sectionalism overlap	Voluntary	8,000	N.A.	46,000	2,250	Yes
SE	Svensk Handel	Sectionalism overlap	Voluntary	10,338	1	274,139	N.A.	No
SE	Visita	Overlap	Voluntary	5,000	5,000	12,000	12,000	Yes
SI	SGT OZS	Overlap	Voluntary	30,000	1,500	80,000	3250	No
SI	TGZS	Overlap	Voluntary	300	300	13,000	13,000	Yes
SI	ZDOPS	Overlap	Voluntary	3,000	N.A.	30,000	N.A.	N.A.
SI	ZDS	Overlap	Voluntary	1,450	50	250,000	8,000	Yes
SK	ZHR SR	Overlap	Voluntary	409	323	N.A.	N.A.	N.A.
UK	ALMR	Sectionalism	Voluntary	23,000	23,000	1,300,000	1,300,000	N.A.

Note: N.A. = not available; data on active members/companies in the sector also considers contract catering for those companies whose domain covers both sectors

Representativeness of the European social partner organisations: Hotels, restaurants and café (HORECA) sector

Table 26: Collective bargaining, consultation and affiliations of employer organisations in the HORECA sector, 2017

Country	Employer organisation	Collective bargaining	Consultation		National European international affiliations
AT	FVG	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	Federal Economic Chamber, WKO, HOTREC, Artglace
AT	FVH	Yes, both single- and multi-employer bargaining	Yes	On an ad-hoc basis	Federal Economic Chamber, WKO, HOTREC, HSU
AT	VVAT	No	N.A.	N.A.	HOTREC
BE	Ho.Re.Ca Bruxelles	Yes, multi-employer bargaining only	Yes	On a regular basis	UCM, HOTREC
BE	Horeca Vlaanderen	Yes, multi-employer bargaining only	Yes	On a regular basis	UNIZO, HOTREC
BE	Horeca Wallonie	Yes, multi-employer bargaining only	Yes	On a regular basis	UCM, HOTREC
BE	BEMORA (by COMEOS)	Yes, multi-employer bargaining only	Yes	On a regular basis	COMEOS, EUROCOMMERCE
BE	COMEOS	Yes, multi-employer bargaining only	Yes	On a regular basis	VBO-FEB, EUROCOMMERCE
BE	UBC (by COMEOS)	Yes, multi-employer bargaining only	Yes	On a regular basis	COMEOS, European Federation For Contract Catering Agencies
BG	BTC	Yes, multi-employer bargaining only	N.A.	N.A.	BIA
CY	OSIKA	Yes, multi-employer bargaining only	Yes	On a regular basis	OEB
CY	PASYXE	Yes, multi-employer bargaining only	Yes	On a regular basis	CCCI, ACTA, HOTREC; IHRA, UFTAA
CY	STEK	Yes, multi-employer bargaining only	Yes	On a regular basis	OEB
CZ	AHRČR	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	SOCR, ČR, HOTREC
CZ	SOCR	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	SP, ČR, EuroCommerce, BUSINESSEUROPE (via its membership in SP ČR)
DE	BdS	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	BDA, BLL, ZAW, Business Europe, via BDA, FoodDrink Europe, via the BLL
DE	DEHOGA	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	HOTREC
DE	IHA	No	Yes	On an ad-hoc basis	DEHOGA, HOTREC

Representativeness of the European social partner organisations: Hotels, restaurants and café (HORECA) sector

DK	HORESTA	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	DA, HOTREC, Green Key, FEE
EE	EHLR	No	Yes	On an ad-hoc basis	Estonian Employers Confederation, HOTREC, HSU
EL	HCH	No	Yes	On a regular basis	HOTREC
EL	HHF	Yes, multi-employer bargaining only	No	N.A.	SETE
EL	POESE	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	GSEVEE, UEAPME via GSEVEE
ES	CEHAT	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	CEOE, HOTREC
ES	CEHRATC	Yes, multi-employer bargaining only	N.A.	N.A.	N.A.
ES	FEADRS	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	FEHR, FOODEUROPE
ES	FEHR	Yes, multi-employer bargaining only	N.A.	N.A.	CEOE, HOTREC
FI	AVAINTA	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	N.A.
FI	KT	Yes, multi-employer bargaining only	Yes	On a regular basis	CEMR, CEEP
FI	MaRa	Yes, multi-employer bargaining only	Yes	On a regular basis	HOTREC, NB
FR	A & T	Yes, multi-employer bargaining only	No	N.A.	CMPE
FR	FNHPA	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	EFCO
FR	GNC	Yes, multi-employer bargaining only	No	N.A.	UMIH, HOTREC
FR	GNI	Yes, multi-employer bargaining only	Yes	On a regular basis	CPME, U2P HOTREC IH&RA
FR	SNARR	Yes, multi-employer bargaining only	N.A.	N.A.	MEDEF
FR	SNRPO	Yes, multi-employer bargaining only	No	N.A.	UMIH
FR	SNRTC	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	UMIH (associated)
FR	UMIH	Yes, multi-employer bargaining only	Yes	On an ad-hoc basis	MEDEF, CPME, U2P HOTREC

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HR	HUP – UUT	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	HUP, CE, Business Europe, HOTREC
HU	MSZÉSZ	Yes, multi-employer bargaining only	Yes	On a regular basis	HOTREC, HSMIAI
HU	VIMOSZ	Yes, multi-employer bargaining only	Yes	On a regular basis	Munkaadók és Gyáriparosok Országos Szövetsége, MGYOSZ (Confederation of Hungarian Employers and Industrialist), FoodServiceEurope
IE	IHF	No	Yes	On an ad-hoc basis	HOTREC
IE	RAI	Yes, single-employer bargaining only	Yes	On an ad-hoc basis	HOTREC
IT	ANGEM	Yes, multi-employer bargaining only	Yes	On a regular basis	Food Service Europe
IT	Assoturismo	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Confesercenti
IT	Confindustria AICA	Yes, multi-employer bargaining only	Yes	On a regular basis	Confindustria, Federturismo Confindustria;
IT	FAITA Federcamping	Yes, multi-employer bargaining only	Yes	N.A.	Confcommercio EFCO - European Federation of Camping site Organizations
IT	Federalberghi	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	Confcommercio, Confturismo, HOTREC
IT	FIPE	Yes, multi-employer bargaining only	Yes	N.A.	Confturismo, Confcommercio, HOTREC
LT	LVRA	No	Yes	On a regular basis	HOTREC
LU	HORESCA	No	Yes	On a regular basis	UEL, HOTREC
LV	LVRA	Yes, multi-employer bargaining only	Yes	N.A.	LDDK, HOTREC
MT	MHRA	No	Yes	On a regular basis	HOTREC
NL	KHN	No	N.A.	N.A.	VNO-NCW, HOTREC
NL	NHG	Yes, multi-employer bargaining only	N.A.	N.A.	None
PL	IGHP	No	Yes	On an ad-hoc basis	HOTREC
PT	AHETA	Yes, multi-employer bargaining only	N.A.	N.A.	CPT
PT	AHRESP	Yes, multi-employer	N.A.	N.A.	CPT, CCP, CIP, EFCO - HAP,

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		bargaining only			FoodServiceEurope, UIB
PT	AHP	Yes, multi-employer bargaining only	N.A.	N.A.	CTP
PT	AIHSA	Yes, multi-employer bargaining only	N.A.	N.A.	None
PT	APHORT	Yes, multi-employer bargaining only	N.A.	N.A.	CTP
SE	Almega	Yes, multi-employer bargaining only	N.A.	N.A.	None
SE	LI	Yes, multi-employer bargaining only	N.A.	N.A.	The Confederation of Swedish Enterprise, FoodDrinkEurope
SE	Svensk Handel	Yes, single-employer bargaining only	N.A.	N.A.	Euro Commerce
SE	Visita	Yes, multi-employer bargaining only	Yes	On a regular basis	The Swedish Confederation of Enterprise, HOTREC, Food Service Europe; UNWTO
SI	SGT OZS	Yes, multi-employer bargaining only	Yes	On a regular basis	OZS, UEAPME
SI	TGZS	Yes, both single- and multi-employer bargaining	Yes	On a regular basis	GZS, HOTREC
SI	ZDOPS	Yes, multi-employer bargaining only	No	N.A.	N.A.
SI	ZDS	Yes, multi-employer bargaining only	Yes	On a regular basis	BUSINESSEUROPE, Adriatic Regional, Employers` Center BIAC, ILO, Union of Black Sea and Caspian Business
SK	ZHR SR	No	Yes	On a regular basis	RUZ SR, HOTREC, RDA
UK	ALMR	No	Yes	N.A.	HOTREC

Note: N.A. = not available.

Representativeness of the European social partner organisations: Hotels, restaurants and café (HORECA) sector

Table 27: Employer organisations with sectoral members that are not involved in collective bargaining or affiliated to HOTREC

Country	Employer organisation	Domain coverage	Type of membership	Companies total	Companies in the sector	Employees total	Employees in the sector	Largest companies affiliated
LU	FEDIL	Sectionalism overlap	Voluntary	550	5	106,000	2,300	Yes
MT	GRTU	Sectionalism overlap	Voluntary	8,214	N.A.	N.A.	N.A.	N.A.
PL	KRGiC	Sectionalism overlap	Voluntary	25	N.A.	11,000	N.A.	Yes
PL	ZPT Lewiatan	Sectionalism overlap	Voluntary	31	8	N.A.	N.A.	No
RO	FPTR	Overlap	Voluntary	3,092	N.A.	21,852	N.A.	Yes
UK	BBPA	Sectionalism overlap	Voluntary	73	N.A.	N.A.	N.A.	Yes
UK	BHA	Sectionalism overlap	Voluntary	46,000	N.A.	500,000	N.A.	N.A.

Note: N.A. = not available.

Annex 2: Organisation names and abbreviations

Table 28: Trade union organisation names

Country	Abbreviation	Full association name
AT	GPA-djp	Union of Salaried Private Sector Employees, Graphical Workers and Journalists
AT	VIDA	VIDA Trade Union
BE	ABVV-FGTB Horval	General Workers Federation of Belgium – Horeca and food
BE	ACLVB-CGSLB	General Confederation of Liberal Trade Unions
BE	ACV-CSC Voeding en Diensten	General Christian Trade Union – Food and Drink
BG	ITUFECCTS	Independent Trade Union Federation of Employees in Commerce, Cooperatives, Tourism and Services
BG	NFCSCT Podkrepa CL	National Federation of Commerce, Services, Customs and Tourism Podkrepa CL
BG	STB	Syndicate of Tourism in Bulgaria
CY	OYXEKA – SEK	Employees Federation of Hotels, Food and Recreation Centres
CY	SYXKA – PEO	Cyprus Hotel and Catering Establishments Employees’ Trade Union
CZ	ČMOS PHCR	Czech Moravian Trade Union of Catering, Hotels and Tourism
DE	NGG	Trade Union of Food, Beverages, Tobacco, Hotel and Catering and Allied Workers
DK	3F	United Federation of Danish Workers
EE	EMSA	Estonian Seamen’s Independent Union
EE	ETKA	Estonian Trade Union of Commercial and Servicing Employees
EL	POEELYTE	Panhellenic Federation of Catering Workers and Tourist Profession Employees
ES	CCOO-SERVICIOS	Services Federation of the Trade Union Confederation of Workers’ Commissions
ES	ELA-ZERBITZUAK	Basque Workers’ Solidarity Services
ES	FeSMC – UGT	Service for the Mobility and Consumption of the General Workers’ Union
ES	LAB	Patriotic Workers’ Commission
FI	PAM	Service Union United
FR	CFDT Services	Federation for Services of the French Democratic Confederation of Labour
FR	CFTC CSFV	Federation of Trade Unions for Retail, Services and Sales Forces of the French Confederation of Christian Workers
FR	CGT Commerce	Federation Retail and Services of the General Confederation of Labour
FR	FGTA/FO	General Federation of Workers from Agriculture, the Agrofood Industry, Tobacco and Related Activities / General Confederation of Labour

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FR	INOVA / CFE-CGC	National Federation for Hostels, Restaurants, Sport, Leisure and Casinos of the French Confederation of Management – General Confederation of Professional and Managerial Staff
FR	UNSA Commerce et Services	Federation Commerce and Services of the National Union of Autonomous Unions
HR	SIKD	Trade Union of Istria, Kvarner and Dalmatia
HR	STUH	Autonomous Trade Union of Catering and Tourism of Croatia
HU	VISZ	Hungarian Trade Union of Catering and Tourism
IE	Mandate	Mandate
IE	SIPTU	Services Industrial Professional Technical Union
IT	FILCAMS-CGIL	Italian Federation of Workers in the Trade, Tourism, and Service Sectors
IT	FISASCAT	Italian Federation of Trade Unions of Workers in the Tourism, Trade Service, and Related Sectors
IT	Manageritalia	National Federation of Managers and Professionals of the Commerce, Transport, Tourism and Tertiary Sectors
IT	UILTUCS-UIL	Italian Union of Workers in the Tourism, Trade and Service Sectors
LU	LCGB Services & Commerce	Confederation of Christian Unions in Luxembourg – Services & Retail
LU	OGBL	Food and Hotels Industry of the Trade Union Confederation of Luxembourg
LV	LAKRS	Latvian Trade Union of Public Service and Transport Workers
MT	GWU	General Workers Union
NL	CNV Vakmensen	Christian National Union Federation Professionals
NL	De Unie	The Union
NL	FNV – Horecabond	Federation of Dutch Trade Unions – Horeca
PL	NSZZ Solidarność	Independent and Self-Governing Trade Union ‘Solidarity’
PT	FESAHT	Federation of Unions in Food, Beverages, Hotels and Tourism of Portugal
PT	SITESE	Union of Workers and Staff in Services, Commerce, Restaurants and Tourism
SE	HRF	Swedish Hotel and Restaurant Workers’ Union
SE	Unionen	Unionen
SI	SDGiTS KS90	The Catering and Tourism Workers’ Union of Slovenia at Confederation ’90
SI	Sindikats GiT	The Catering and Tourism Workers’ Union of Slovenia
SI	SOPS	Trade Union of Crafts and Entrepreneurship Slovenia
SK	OZ POCHR	Trade Union Association of Employees in Commerce and Tourism
UK	BFAWU	Bakers, Food and Allied Workers’ Union
UK	GMB	General Municipal and Boilermakers Union
UK	Unite the Union	Unite the Union

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Table 29: Employer organisation names

Country	Abbreviation	Full association name
AT	FVG	Federal Association Gastronomy
AT	FVH	Federal Association Hotels
AT	VVAT	Association of Event Organisers Austria
BE	BEMORA (by COMEOS)	Belgian Modern Restaurant Association
BE	COMEOS	COMEOS
BE	Ho.Re.Ca Bruxelles	Ho.Re.Ca Bruxelles
BE	Horeca Vlaanderen	Horeca Flanders
BE	Horeca Wallonie	Horeca Wallonie
BE	UBC (by COMEOS)	Union Of Belgian Catering
BG	BTC	Bulgarian Tourist Chamber
CY	OSIKA	Federation of Entertainment Establishments Owners Associations
CY	PASYXE	Cyprus Hotel Association
CY	STEK	Association of Cyprus Tourist Enterprises
CY	OSIKA	Federation of Entertainment Establishments Owners Associations
CZ	AHRČR	Czech Association of Hotels and Restaurants
CZ	SOCR	Czech Confederation of Commerce and Tourism
DE	BdS	Federal Association of the System Catering Industry
DE	DEHOGA	German Hotel and Restaurant Association
DE	IHA	German Hotel Association
DK	HORESTA	Employers' Association for the Hotel, Restaurant and Tourism Industry in Denmark
EE	EHRL	Estonian Hotel and Restaurant Association
EL	HCH	Hellenic Chamber of Hotels
EL	HHF	Hellenic Hotel Federation
EL	POESE	Panhellenic Federation of Restaurants and Related Businesses
ES	CEHAT	Spanish Federation of Hotels and Holiday Accommodation
ES	CEHRATC	Employer Organisation of Hotels, Restaurants and Tourism Apartments
ES	FEADRS	Spanish Federation of Catering Associations
ES	FEHR	Spanish Federation of Accommodation and Food Service Activities
FI	AVAINTA	AVAINTA
FI	KT	KT Local Government Employers
FI	MaRa	Finnish Hospitality Association

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FR	A & T	Food & Trends
FR	FNHPA	National Federation of Outdoor Hotels
FR	GNC	National Association of Hotel Chains
FR	GNI	National Association of Independents
FR	SNARR	National Employer Organisations for Food and Fast-food Restaurants
FR	SNRPO	National Trade Union of Organized Public Catering
FR	SNRTC	National Employers' Organisation for Thematic and Commercial Restaurants
FR	UMIH	Union of Trades and Industries of the Hotel Industry
HR	HUP – UUT	Croatian Employers' Association – Catering and Tourism Association
HU	MSZÉSZ	Hotel Association of Hungary
HU	VIMOSZ	Tourism and Hospitality Association of Employers
IE	IHF	Irish Hotels Federation
IE	RAI	Restaurant Association of Ireland
IT	ANGEM	National Association of Catering Companies and Various Services
IT	Assoturismo	Italian Federation of Tourism Companies
IT	Confindustria AICA	
IT	FAITA Federcamping	Federation of the Italian Association of Camping
IT	Federalberghi	Federation of Italian Hotel and Tourism Associations
IT	FIPE	Italian Federation of Public Concerns
LT	LVRA	Lithuanian Association of Hotels and Restaurants
LU	HORESCA	National Federation of Hoteliers, Restaurateurs and Coffee Makers of the Grand Duchy of Luxembourg
LV	LVRA	Association of Latvian Hotels and Restaurants
MT	MHRA	Malta Hotels and Restaurants Association
NL	KHN	Royal Horeca Netherlands
NL	NHG	Dutch Horeca Guild
PL	IGHP	Chamber of Commerce of the Polish Hotel Industry
PT	AHETA	Associations of Hotels and Tourist Resorts of the Algarve
PT	AHP	Hotel Business Association of Portugal
PT	APHORT	Portuguese Association of Hotels, Restaurants and Tourism
PT	AHRESP	Association of Hotels, Restaurants and Similar Businesses of Portugal
PT	AIHSA	Association of Hotel Operators and Similar Services of the Algarve
SE	Almega	Almega Service Associations
SE	LI	The Swedish Food Federation

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SE	Svensk Handel	The Swedish Trade Federation
SE	Visita	Visita
SI	TGZS	Tourism and Hospitality Chamber of Slovenia
SI	SGT OZS	Catering and Tourism Sector of the Chamber of Crafts and Small Businesses
SI	ZDOPS	Employers' Association of Craft and Entrepreneurs of Slovenia
SI	ZDS	Association of Employers of Slovenia, Catering and Tourism Section
SK	ZHR SR	Association of Hotels and Restaurants in the Slovak Republic
UK	ALMR	Association of Licensed Multiple Retailers

Annex 3: Details of sector-related bodies and data sources

Table 30: Tripartite and bipartite sector related bodies

Country	Name of the body	Scope of activity	Bipartite or tripartite	Origin	Trade unions participating	Employer organisations participating
BE	Welfare fund	Welfare	Bipartite	Agreement/ Statutory	ABVV- FGTB, ACV- CSC, ACLVB- CGSLB	Comeos, Horeca Vlaanderen, Horeca Brussel, Horeca Wallonië
BE	Horeca Education Flanders	Education	Bipartite	Agreement/ Statutory	ABVV- FGTB, ACV- CSC	Horeca Vlaanderen
BE	Horeca Education Brussels	Education	Bipartite	Agreement/ Statutory	ABVV- FGTB, ACV- CSC	Horeca Brussel
BE	Horeca Education Wallonia	Education	Bipartite	Agreement/ Statutory	ABVV- FGTB, ACV- CSC	Horeca Wallonië
BE	Fund for Additional Pensions – Horeca	Pension	Bipartite	Statutory	ABVV- FGTB, ACV- CSC, ACLVB- CGSLB	Comeos, Horeca Vlaanderen, Horeca Brussel, Horeca Wallonië
BG	National Tourist Council	N.A.	Tripartite	Statutory	ITUFECCTS, NFCST Podkrepa CL, STB	BTC
BG	Inter-governmental Council	N.A.	Tripartite	Statutory	ITUFECCTS, NFCST Podkrepa CL, Syndicate of Tourism in Bulgaria	BTC
CY	Committee for the Conditions of Service in Hotels	N.A.	Tripartite	Statutory	SYXKA-PEO, OYXEKA-SEK	PASYXE, STEK

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Country	Name of the body	Scope of activity	Bipartite or tripartite	Origin	Trade unions participating	Employer organisations participating
CY	Committee for the Conditions of Service in Catering Establishments	N.A.	Tripartite	Statutory	SYXKA-PEO, OYXEKA-SEK	OSIKA, PASIKA
CY	Board of Directors of the Higher Hotel Institute of Cyprus	N.A.	Tripartite	Statutory	SYXKA-PEO, OYXEKA-SEK	PASYXE, STEK
DE	BMWl's Tourism Advisory Council	Working conditions, training opportunities, securing skilled labour, digitalisation and the sharing economy	Tripartite	Statutory	NGG	DEHOGA, BDA
DE	Hogarente	Occupational pension fund	Bipartite	Agreement	NGG	DEHOGA
DK	Vocational Committee for the training of waiters	Training	Bipartite	Statutory	3F	HORESTA
DK	Vocational Committee for the gastronomer training	Training	Bipartite	Statutory	3F	HORESTA
DK	Vocational Committee for the training of receptionists	Training	Bipartite	Statutory	3F	HORESTA
DK	The branch work environment committee in hotel and restaurant	Work environment	Bipartite	Statutory	3F	HORESTA
ES	Spanish Council of the Tourism sector	Advises the government on policies focused on tourism sector	Tripartite	Statutory	CCOO and UGT	CEHAT
FI	Occupational safety sector group of the Centre for Occupational Safety for the service sector	Occupational safety and working life	Tripartite	Agreement	PAM, SAK, STTK, SFL, Akava	EK, Kauppa, FFI, PALTA, HALI, Kiinteistötyönantajat, APTA, MaRa, AFIEE, HPL
FI	Competence prognostics group for hotel, restaurant and travel services	Competence	Tripartite	Statutory	PAM, SAK, JHL, ERTO, STTK, ET ry, Jyty, STTK, SURE, Akava Special Branches, OAJ	MaRa, EK, KT, AFIEE, MTK, SY

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Country	Name of the body	Scope of activity	Bipartite or tripartite	Origin	Trade unions participating	Employer organisations participating
FR	Commission paritaire nationale de l'emploi et de la formation professionnelle (CPNEFP)	Vocational training hotels and restaurants	Bipartite	Agreement	CFDT, CGT-FO, CFTC, CFE-CGC	UMIH, GNC, GNI, SNRTC
FR	Commission paritaire nationale de l'emploi et de la formation professionnelle (CPNEFP)	Vocational training fast-food	Bipartite	Agreement	CFDT, CGT-FO, CFTC, CFE-CGC	SNARR
FR	Commission paritaire nationale de l'emploi et de la formation professionnelle (CPNEFP)	Vocational training Outdoor Hospitality	Bipartite	Agreement	CFDT, CGT-FO, CFTC, CFE-CGC	FNHPA
FR	Commission paritaire nationale de l'emploi et de la formation professionnelle (CPNEFP)	Vocational training Cafeteria	Bipartite	Agreement	CFDT, CGT-FO, CFTC, CFE-CGC CFTC	SNRPO
FR	FAFIEC	Vocational training fast-food, catering, outdoors hospitality	Bipartite	Agreement	CFDT, CGT-FO, CFTC, CFE-CGC CFTC	SNARR, SNERS, SNRC, FNHPA, SNRPO
FR	FAFIH	Vocational training HCR (branch)	Bipartite	Agreement	CFDT, CGT-FO, CFTC, CFE-CGC	
FR	AGP-HPA	Financing of paritarism	Bipartite	Agreement 2011	CFDT, CGT-FO, CFTC, CFE-CGC	FNHPA
HR	Social council for tourism	Sectoral policies	Bipartite	Agreement	STUH, SIKD	HUP – UUT
HU	Tourism and Catering Sectoral Dialogue Committee	A mid-level cooperation and interest reconciliation forum for the social partners in tourism, accommodation, catering and community catering.	Bipartite	agreement	VIMOSZ	VISZ
IT	Fon.te	Supplementary pension fund for Tertiary sector's employees	Bipartite	Agreement	Filcams-Cgil, Fisascat-Cisl, Uiltucs-Uil,	Confcommercio, Faita,

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Country	Name of the body	Scope of activity	Bipartite or tripartite	Origin	Trade unions participating	Employer organisations participating
						Federalberghi, Fipe, Fiavet
IT	Cassa QuAS	Health care insurance fund for executives	Bipartite	Agreement	Filcams-Cgil, Fisascac-Cisl, Uiltucs-Uil,	Confcommercio
IT	Fondo Est	Integrated healthcare insurance fund for employees in the trade, tourism and service sectors	Bipartite	Agreement	Filcams-Cgil, Fisascac-Cisl, Uiltucs-Uil,	Confcommercio, Fipe, Fiavet
IT	Fondo Aster	Integrated healthcare insurance fund for employees in the trade, tourism and service sectors	Bipartite	Agreement	Filcams-Cgil, Fisascac-Cisl, Uiltucs-Uil,	Confesercenti
IT	For.te	Interprofessional national found for continuous training	Bipartite	Statutory	Cgil, Cisl, Uil	Confcommercio, Confetra
IT	Fon.ter	Interprofessional national found for continuous training in Tertiary sector	Bipartite	Statutory	Cgil, Cisl, Uil	Confesercenti
IT	Quadrifor	Bilateral institute for the development of executives' training in the Tertiary sector	Bipartite	Statutory	Filcams-Cgil, Fisascac-Cisl, Uiltucs-Uil	Confcommercio
MT	Scientific Committee of the Institute for Tourism Studies (ITS)	The committee focuses on tourism and hospitality which shall develop and review the curriculum of the Institute by identifying essential competences of current and future workforce within the tourism and hospitality	Tripartite	Statutory	Malta Union of Tourist Guides	Malta Hotels and Restaurants Association, Gozo Tourism Association, Federated Association of Travel and Tourism Agents
MT	Sector Skills Unit for Hospitality and Tourism	Occupational standards, validation mechanisms, guidance to candidates, adequate quality assurance mechanisms and validation of non-formal and informal learning	Tripartite	Statutory	General Workers Union	Malta Hotels and Restaurants Association

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Country	Name of the body	Scope of activity	Bipartite or tripartite	Origin	Trade unions participating	Employer organisations participating
NL	Pensioenfonds Horeca & Catering	Pension fund	Bipartite	Agreement	FNV Horeca, CNV Vakmensen	KHN, VENECA
NL	Vakraad voor de Contractcateringbranche	CBA enforcement of contract catering CBA	Bipartite	Agreement	FNV Catering (part of FNV Horeca), CNV Vakmensen, De Unie	VENECA
NL	Opleidingen Contractcatering	Education and training in contract catering	Bipartite	Agreement	FNV Catering (part of FNV Horeca), CNV Vakmensen, De Unie	VENECA
RO	Consultative Council of Tourism	To increase the competitiveness of the sector, propose legislative changes, and monitor the implementation of public programmes in the tourist sector	Bipartite (public authorities and employer organisation)	Statutory, functions inside the ministry of Tourism		FPTR
RO	Sectorial Committee for Tourism, Hotels and Restaurants	Its aim is to monitor and coordinate the documents that regulate the occupations and qualifications in the sector and to ensure their correlation with the labour market demands. It is also responsible for the elaboration of the sectors' national strategy in the field of professional training	Tripartite	Statutory	FST	FPTR
SE	The R&D Fund of the Swedish Tourism & Hospitality Industry (BFUF)	The aim of BFUF is to promote scientific research and innovation within the hospitality sector.	Bipartite	Agreement	The Hotel and Restaurant Workers' Union (HRF)	Visita
SE	The Hospitality Sector's Education Council (UHR)	The aim of the council is to strengthen the status of sector related education.	Bipartite	Agreement	The Hotel and Restaurant Workers' Union (HRF), Unionen	Visita, The Cooperative Movement Bargaining Organisation (KFO)

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Country	Name of the body	Scope of activity	Bipartite or tripartite	Origin	Trade unions participating	Employer organisations participating
UK	Health and Safety Hospitality Industry Liaison Committee	Health and Safety	Tripartite	Statutory	Unite, Unison	BHA, BRC, BBPA. In addition to other trade associations such as BESA and the BRC and reps from a number of large companies

Table 31: Sources of the employment data in the HORECA sector (Table 3)

Country	Total employment	Source	Data
AT	290,120	STATcube database, Statistics Austria	2015
BE	N.A.	Guidea, Steunpunt Werk	
BG	124,933	Annual survey on number of employees, wages and salaries and other labour costs, NSI	2015
CY	36,855	Hotels and Restaurants Statistics 2015, Statistical Service of Cyprus	2015
CZ	166,500	Labour Force Survey, Czech Statistical Office (ČSÚ)	
DE	1,579,000	Statistics of the Federal Statistical Office (destatis) and its micro census	Figures include data for NACE Code 56.29 and 55.90, as they are only available on a 3-digit level.
DK	96,194	RAS300 and special run, StatBank Denmark	2015
EE	26,500	Estonian Labour Force Survey, Statistics Estonia	Figures include data for NACE Code 56.29
EL	331,411	Labour Force Survey 2016, second quarter, ELSTAT	Figures include data for NACE Code 56.29
ES	1,604,200	Labour Force Survey	Figures include data for NACE Code 56.29
FI	49,666	Employment, Official Statistics of Finland (OSF), Statistics Finland	Preliminary data for 2016
FR	N.A.	INSEE ESANE 2014, DARES	
HR	44,218	Structural business statistics, Croatian Bureau of Statistics	
HU	79,805	Monthly labour report, KSH	

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IE	148,000	Quarterly national household survey figures for accommodation and food service, Central Statistics Office	
IT	1,186,796	National structural business statistics, Istat	2014
LT	38,198	Labour Force Survey, Eurostat	
LU	16,361	STATEC	
LV	31,616	Annual survey of enterprises and administrative data, CSP	
MT	13,300	Eurostat database	
NL	405,000	CBS Statline: 'Arbeid; bedrijfstak en geslacht'	2015. Figures include data for NACE Code 56.29
PL	376,200	Eurostat	
PT	292,522	INE database	Figures include data for NACE Code 56.29
RO	159,917	National Institute of Statistics	
SE	N.A.	N.A.	
SI	32,806	Statistical Office of the Republic of Slovenia	
SK	103,300	Labour Force Survey, SU SR	
UK	2,209,000	Not provided.	

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Table 32: Sources of the data on the number of companies in the HORECA sector (Table 4)

Country	Number of companies 2016	Source	Data
AT	46,930	STATcube database, Statistics Austria	2015
BE	57,488	Guidea, Steunpunt Werk	
BG	24,597	Annual survey on number of employees, wages and salaries and other labour costs, NSI	2015
CY	5,004	Hotels and Restaurants Statistics 2015, Statistical Service of Cyprus	2015
CZ	144,668	ČSÚ	
DE	235,858	Company register (as of reporting date 31 October 2016)	
DK	12,802	Special run, StatBank Company Statistics, Statistics Denmark	2015
EE	2,695	EKOMAR, annual statistical questionnaire, Statistics Estonia	Figures include 56.29
EL	86,696	Labour Force Survey 2016, second quarter, ELSTAT	Figures include 56.29

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ES	276,093	DIRCE	Figures include 56.29
FI	11,710	Structural business and financial statement statistics, OSF, Statistics Finland	Figures include 56.29
FR	272,289	INSEE ESANE 2014	2014
HR	19,790	Structural business statistics, Croatian Bureau of Statistics	2015
HU	29,151	Monthly labour report, KSH	
IE	N.A.	Not provided	
IT	310,518	National structural business statistics, Istat	2015. Data does not include NACE code 56.21
LT	5,519	Annual detailed enterprise statistics for services (NACE Rev. 2, H-N), number of enterprises, Eurostat Services by employment size class (NACE Rev. 2, H-N, S95), Eurostat	Figures include 56.29
LU	2,622	Répertoire des entreprises luxembourgeoises 2016, STATEC	Figures include 56.29
LV	3,556	Annual survey of enterprises and administrative data, CSP	
MT	4,377	Business demographics 2011-2016, National Statistics Office, Malta	Figures include 56.29
NL	52,225	Bedrijven; bedrijfstak, CBS Statline	
PL	53,988	Structural business statistics, Eurostat	2014
PT	92,802	INE database	
RO	25,126	National Institute of Statistics	2015
SE	31,810	Company database, Statistics Sweden	2015
SI	11,416	Statistical Office of the Republic of Slovenia	
SK	19,321	Company register, Slovak Statistical Office	
UK	185,510	Business population estimates 2016, BEIS	

Source: Author's own calculations, based on Network of Eurofound Correspondents (2017).

Annex 4: Network of Eurofound correspondents

Table 33: Correspondents who contributed to the study

Country	Correspondent	Organisation
AT	Bernadette Allinger	FORBA
BE	Dries Van Herreweghe Guy Van Gyes	HIVA – KU Leuven
BG	Gabriela Yordanova	Bulgarian Academy of Sciences
CY	Pavlos Kalosinatos	Cyprus Labour Institute (INEK-PEO)
CZ	Sona Veverkova	Research Institute for Labour and Social Affairs
DE	Sandra Vogel Birgit Kraemer	Cologne Institute for Economic Research Hans-Böckler-Stiftung (HBS)
DK	Carsten Jorgensen	FAOS, University of Copenhagen
EE	Ingel Kadarik	Praxis Centre for Policy Studies
EL	Penny Georgiadou	Labour Institute of GSEE
ES	Maria Caprile	Notus
FI	Anna Savolainen	Oxford Research
FR	Frederic Turlan	IR Share
HR	Predrag Bejaković	Institute of Public Finance
HU	Pál Belyó	Policy Agenda Tanácsadó Kft.
IE	Andy Prendergast	IRN Publishing
IT	Feliciano Iudicone	Fondazione Giacomo Brodolini
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Frederic Turlan	IR Share
LV	Kriss Karnitis	EPC Ltd
MT	Louis Grech	
NL	Noelle Payton	University of Amsterdam
PL	Marta Trawinska	Institute of Public Affairs
PT	Reinhard Naumann	
RO	Pompiliu Golea Mihaela Stoica	European Institute of Romania Euractiv Network
SE	Anna Savolainen	Oxford Research AB
SI	Barbara Luzar	Faculty of Social Sciences, University of Ljubljana
SK	Ludovit Cziria	Institute for Labour and Family Research
UK	Mark Carley	

This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the hotels, restaurants and café (HORECA) sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue and their capacity to negotiate agreements. The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identified EFFAT (representing employees) and HOTREC (representing employers) as the most representative European level social partner organisations in the HORECA sector.

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