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Project V/001/97**

**Sectoral Unions and Employers Organisations
in the EU Hotels, Restaurants and Cafés sector(NACE 55)**

Final Report

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Le contenu de la présente publication ne reflète pas nécessairement l'avis de la Direction Générale de l'Emploi et des Affaires sociales de la Commission européenne. Cette étude a été réalisée par des experts indépendants et son contenu n'engage en rien la responsabilité de la Commission. Par ailleurs, les organisations européennes concernées ont eu la possibilité de faire des remarques sur le contenu de l'étude avant sa version définitive.

Disclaimer

The contents of this publication do not necessarily reflect the opinion or position of the European Commission, Directorate-General Employment and Social Affairs. This study has been carried out by independent experts. It therefore does not involve the Commission's responsibility in any way. The European organisations subject of this study have had the opportunity to comment on the content of this study before its final approval.

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1. Introduction

This paper is the 18th report arising out of the study commissioned from the Institut des Sciences du Travail (IST) at the Catholic University of Louvain by the European Commission services, DGV, following call for tenders No V/001/97. This report seeks to provide the Commission with empirical data that will facilitate an assessment of the institutional representative status of European employers' and employees' organisations in the sector in the 15 Member States of the EU. It follows on from other research in the same field, but focuses particularly on organisations recognised as 'social partners' in the intersectoral level in each EU country, organisations affiliated to the CEC¹ and to Eurocadres, and organisations that sign collective agreements in the construction, textiles and commerce sector. We will next tackle specifically the hairdressing and beauty care sector.

The context

In a Communication² published in 1993, the European Commission set out three criteria determining the access that employers' and employees' organisations had to the consultative process under Article 3 of the Agreement on Social Policy. According to the terms of this Article, organisations must '*1. be cross-industry or relate to specific sectors or categories and be organised at European level; 2. consist of organisations which are themselves part of Member States' social partner structures and with the capacity to negotiate agreements, and which are representative of all Member States, as far as possible; 3. have adequate resources to ensure their effective participation in the consultation process*'³.

A subsequent Communication published in 1998⁴, introduced the concept of '*Sectoral Dialogue Committees*'; these were intended to replace the existing *Joint Committees* and *informal working groups* that had hitherto been the *locus* of sectoral relations between employers and employees at a European level. The role of these latter bodies at the present time is, without prejudging its future extension, essentially consultative, as happened at intersectoral level. As regards an extension to their competence, each Committee '*(a) shall... be consulted on developments at Community level having social implications, and develop and promote the social dialogue at sectoral level*'⁵.

It follows that the setting up of these Committees is an extension of the process of social dialogue at European sectoral level, albeit relying on an existing system. Before the Communication from the Commission was published, there were 9 Joint Committees and 11 informal groups in existence. By 1 February 1999, 21 applications from employers' and employees' organisations had been forwarded to the Commission⁶: they came from sectors as varied as agriculture, road transport, postal services, commerce, and hotels, restaurants and cafés.

¹ Confédération Européenne des Cadres.

² COM(93) 600 final of 14 December 1993, Communication from the Commission concerning the application of the Protocol on Social Policy presented by the Commission to the Council and the European Parliament, Luxembourg, Office for Official Publications of the European Communities, §24.

³ For a more in-depth discussion of these criteria, we refer the reader to the first study, which focused on employers' and employees' organisations at an 'intersectoral' level.

⁴ Communication from the Commission concerning the application of the Protocol on Social Policy presented by the Commission to the Council and the European Parliament *Adapting and promoting the social dialogue at Community level* COM(98)-322 of 20 May 1998, Luxembourg, Office for Publications of the European Communities Annex II.

⁵ Op cit §2.

⁶ Source: Weber T, *New era in sectoral social dialogue takes shape*, in EIRO online, Dublin, European Foundation for the Improvement of Living and Working Conditions, 1998 (<http://www.eiro.eurofound.ie/1999/02/features/eu9902150f.html>).

The conditions of membership for the employers' and employees' organisations that might be encouraged to join these Committees, and/or file a joint application for one to be set up, are linked, as at the intersectoral level, to the notion of representative status, and are broadly similar to the those articulated above in the 1993 Communication. The criteria governing Social Dialogue Committees state that:

*'(a) they shall relate to specific sectors or categories and be organized at European level; (b) they shall consist of organizations which are themselves an integral and recognized part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States; (c) they shall have adequate structures to ensure their effective participation in the work of the Committees.'*⁷

As may be observed, the changes focus on the disappearance of demands relating to the intersectoral nature of organisations and on the fact that they are established in all the Member States; although the new rules have not been formulated in a very restrictive manner, they only require employers' and employees' organisations to represent *several* Member States. This relaxation of the implantation condition might eventually pose a demarcation problem in the sense that there is no criterion setting out a minimum number of Member States to activate it. For a more in-depth discussion of these criteria and of the problems that they may pose, we refer the reader to the first study carried out as part of this research⁸.

However, we wish to make it clear that the framework of the IST report will only examine the *institutional consequences* that flow from the recognised or unrecognised representative status of members affiliated to a European organisation. Furthermore, on a theoretical plane, with regard to the various national traditions in this field, representative status – or, more accurately, *recognition of the legitimacy of a social partner organisation* to negotiate collective agreements or take part in the development of social or labour market policies – may be interpreted in any number of ways ranging from the ability to mobilise the activist grass roots effectively, through systems of mutual recognition (in the strict sense of the phrase, in which no criterion is defined), to quantitative thresholds linked to the outcomes of trade union elections. These various systems of recognition, and the extent of the problems of definition that they can pose within each country, will be the subject of a comparative analysis in the course of the coming year.

The approach

In this context, therefore, the research aim as far as existing sectoral committees are concerned will be mainly to provide empirical data that will make possible an assessment of the institutional representative status of the organisations that sit on them, and on the basis of the three afore-mentioned criteria. More specifically, this report will examine employers' and employees' organisations active in the agricultural sector. As far as we are aware at the present time, only two organisations have filed applications with a view to initiating a process of social dialogue in the sector at European level. At a national level, in order to take account of the diversity of the various recognition mechanisms, we will only consider organisations that *participate in collective bargaining*, and which therefore one way or another have *ad hoc* recognition in the sectors referred to. The only exception to this rule concerns organisations that are affiliated to one or other of the European federations that are directly the focus of our research.

⁷ COM(98)322 of 20 May 1998, §1.

⁸ Spineux A., Walthéry P. et al, Report on the representativeness of European social partner organisations, Report coordinated by the Institut des Sciences du Travail of the Catholic University of Louvain, for the European Commission Directorate-General for Employment, Industrial Relations and Social Affairs, Louvain-la-Neuve, 1998, pp.3-7.

However, it is important to bear in mind that in some countries, the sectoral is not mainly, or not at all, the main level of collective bargaining; this structure has accordingly had to be adjusted. In the United Kingdom, and to a lesser extent in Ireland, most bargaining takes place at enterprise level. In Ireland, though, the existence of *Joint Industrial Councils* and *Joint Industrial Committees* that fix minimum conditions of employment and pay for certain categories of enterprise and employee (their members are the main employers' and employees' organisations which also coordinate enterprise-level negotiations) makes it possible to get round the problem by giving indications about the importance of the recognition that they enjoy. In the UK, much wider scope has been given to teams of researchers to assess the main organisations that coordinate enterprise-level bargaining. Lastly, in Greece, sectoral bargaining has a much shorter history with professional (i.e. job category-based) and/or local levels playing a dominant role. However, an institutional framework does exist, and collective agreements have been negotiated at sectoral level since the early 1990s; this makes it possible to identify the leading actors at this level, even if it is still marginal. With the exception of the above, organisations, irrespective of their importance, that do not sign collective agreements are NOT covered in this report.

On the other hand, the list of organisations that are studied is not limited to members of European bodies that have presented joint demands for the setting up of Sectoral Social Dialogue Committees. Within reason, and on the basis of available information, we address all collective bargaining actors in the sectors under examination, as this enables us to draw a collective bargaining 'map' for each of the Member States.

The response

For the purposes of this research, a network has been established of 15 European university researchers⁹ who were independent of both the European Commission and the social partners. The network was given the task of drawing up a report based on a common structure of organisations matching the above criteria in each of the Member States. The IST coordinating team then collated information that had been gathered for the purposes of comparative analysis. Ongoing collaboration is planned between the coordinating team and the national experts. The aim of the process is simultaneously to carry out a 'top-down' approach at European level and a 'bottom-up' approach at Member State level; the IST will also directly collate information about each of the European organisations studied. Lastly, the report will undergo a double check by the Commission's services, and by the European organisations that are themselves being studied, before it is approved.

It is worth noting that the IST team with responsibility for coordinating the work and for editing the summaries and comparative analyses, and the 15 national experts wish to stress their complete independence as to the political consequences and the decisions that might be reached from this study. Their role is limited to contributing as much data as possible, with a view to both making the three criteria of representative status defined by the European Commission intelligible and documenting them.

The structure of the report will then proceed as follows: firstly, we will give consideration to aspects of the sector, and to differences with regard to collective bargaining that might exist from one EU country to another; then, we will present characteristics of members affiliated to the two organisations being studied by examining each of them in respect of:

⁹ See list above.

Quantitative aspects of representative status

- *Employers' organisations*: number of affiliated organisations; number of enterprise members; staff employed in these enterprises, and the rate of affiliation calculated on the basis of employee numbers; if necessary, the detailing of particular characteristics of the organisation and its members (e.g. SMEs).
- *Employees' organisations*: number of affiliated organisations; number of employee members; rate of affiliation; types of employee affiliated (e.g. white-collar/blue-collar, managers and skilled workers).

Recognition

- Does the organisation participate in collective bargaining, consultation (with the government) and the joint management of sectoral funds?
- Challenges to representative status: in the event of particular developments (e.g. the emergence of new organisations that challenge those already established in the sector, or a significant fall in membership), the expert will give a brief description of what has happened, the issues and current trends.

National and European affiliations

- List of high-level, national bodies to which the organisation is directly or indirectly affiliated.
- List of European bodies to which the organisation is directly or indirectly affiliated.

Lastly, in respect of each Member State, we will present a summary of the organisations established there, and a more detailed description of their characteristics.

2. The EU Hotel, Restaurants and Cafés sector

2.1 Activities included in this sector

Activities included in NACE Category 55 mainly concern hotels and other provision for short-stay accommodation, restaurants, cafés, canteens and catering (see Annexes for further detail). When the word 'Horeca' (*HRC, Hotels, Restaurants and Cafés*) is used in this report, it should, unless otherwise stated, be understood to mean all the various activities covered by NACE Category 55.

In 1996, some 1.4 million enterprises in this sector directly employed over 6.5 million people in the EU¹⁰.

Although the number of enterprises in the European Union has fallen in the last few years, and this has been matched by an increase in their size and accommodation capacity, activities in the sector continue to be mainly carried out by small and medium-sized enterprises. However, although more than 90% of enterprises in the sector employ fewer than ten people, it would be wrong to ignore other (large) enterprises, because they are extremely important in terms of employment. In fact, over 45% of employment is concentrated in these large enterprises, and a sub-sector of Horeca, contract catering, is strongly characterised by large enterprises of this type.

2.2 Categories of employee

The Horeca sector provides jobs for both unskilled and skilled workers, and covers a wide range of skills; by its nature, it employs people on very variable working hours and on full-time and part-time contracts. As the intensity of the activity in the sector is dependent on various factors linked to the pace of tourist activity, large numbers of seasonal workers are hired as well as permanent staff during peak periods. Undeclared employment is a constant feature of the sector in all EU countries and, although it is difficult to find figures, undoubtedly accounts for a substantial proportion of the workforce. These figures do not usually appear in various banks of statistics.

2.3 Collective agreements

Member countries of the European Union may be grouped into one of two categories according to whether or not they have sectoral collective agreements.

Among countries with sectoral collective agreements, it is also possible to identify those where sectoral bargaining is based on more specific (e.g. sub-sectoral or regional) agreements – and these are what the sectoral bargaining consists of – and those where such agreements complement sectoral bargaining if it exists at national level.

Belgium, Italy and Portugal have collective agreements for the whole sector, although there are also specific arrangements for contract catering in Italy and Portugal. In other countries, collective bargaining triggers a range of collective agreements that are determined by sub-sector (France, Greece and the Netherlands), or are based on type of employee (Austria¹¹, Finland and Sweden), or are negotiated

¹⁰ Source: Eurostat, *Statistics in Focus, Industry, Trade & Services*, August 2000.

¹¹ It is worth noting that collective agreements in Austria are negotiated by two separate employers' associations depending on the kinds of enterprise they represent (see National Summary).

regionally (Germany and Spain). In some cases, collective bargaining is backed up by agreements directly concluded with enterprises themselves (Denmark, Germany and Sweden).

There is also a small group of countries (Ireland, Luxembourg and the United Kingdom) where there is no sectoral collective bargaining at all. There is only one collective agreement in Luxembourg, and that is concluded directly with an enterprise (a motorway restaurant).

2.4 The Sectoral Social Dialogue Committee

Two organisations are recognised as official partners in European social dialogue in the Horeca sector: the European Federation of Food, Agriculture and Tourism Workers (EFFAT) for the trade unions, and the Confederation of National Associations of Hotels, Restaurants and Cafés and Similar Establishment in the European Union and European Economic Area (HOTREC).

Another sectoral dialogue 'committee' exists in parallel to this one: it is informal, and is specific to the Horeca sub-sector of contract catering. The trade unions are again represented by EFFAT, but the employers' interests are represented by another body, the *Fédération Européenne de la Restauration Collective*/European Federation of Contract Catering Organisations (FERCO). It only represents a specific branch in the sector, that of contract catering.

The fact that employers' interests are not represented by a single body is not due to conflictual relations between the two bodies; it derives from the fact that even though the aim of contract catering (the provision of meals) is part of catering, contract catering itself may be more accurately defined as the provision of an integrated service of which the provision of meals is just one element.

Contract catering also has a number of characteristics – such as the structure of the enterprises (the field is dominated by large multinational enterprises) and the fact that it occupies a different market in which it has to respond to clients' demands of a quite different kind (e.g. in enterprises, schools and hospitals) from classic Horeca. These features ensure that it occupies a somewhat special place in the sector. Moreover, people working in these enterprises have quite different kinds of employment (e.g. in terms of working hours) from those to be found in classical catering.

All of these factors ensure that some FERCO member organisations, not really having to confront the same realities, under pressure from the enterprises that make up their membership – and not wanting to negotiate at national or European level, but directly with enterprises in the sector – are opposed to FERCO joining the Sectoral Dialogue Committee, which is currently run by HOTREC and EFFAT.

This does not stop the two employers' associations from working together in certain fields. Even though their joint work does not concern sectoral dialogue, they invite one another's representatives as observers to their meetings on social dialogue, and in this way keep one another informed on how their work is progressing. However, it is important to remember that in the Horeca sector as a whole, there are only two key actors on the European sectoral dialogue scene: HOTREC for the employers, and EFFAT for the trade unions.

2.5 Methodological observations

We wish to draw the reader's attention to the quantitative data and the wide range of sources. In addition to the figures supplied by our network of national experts, there is information provided by national and European organisations and other bodies, and estimates made by the IST on the basis of available data. These estimates need to be viewed with considerable caution, and should only be used to develop a more global view of employment, and of trade union membership at sectoral level.

As far as this statistical data is concerned (and with the exception of the density calculation, which is the outcome of our own calculations), we prefer to use figures that have been sent to us by our national experts. However, when a significant difference is identified between the data notified to us by experts and by other sources such as European organisations (either directly, or indirectly via the questionnaire that they had to complete as part of setting up the Sectoral Dialogue Committee), we refer to the alternative figures sent to us by these organisations in a footnote.

We use *density* as a tool to estimate the quantitative significance of trade unions and employers' associations in the sector. Density is calculated as the total of members (trade unions) or of employees in member companies (employers' associations), divided by the number of employees throughout the sector. In the absence of data relating to the number of employees, total employment figures are used, and self-employed workers are therefore included. However, these figures must be used with the greatest of caution:

- total membership should, unless otherwise stated, be understood to mean *the number of workers in the sector concerned who are members of the union*. It is not, therefore, as far as non-specific trade unions in the agriculture sector are concerned, the total number of members in that union;
- given the large number of self-employed workers in the sector, the use of data relating to employment in the density calculation should be viewed with considerable caution. The results of these calculations have a significant tendency to underestimate the actors' importance;
- in different cases, density calculations have been carried out using an extra method than the standard manner and therefore should not be used in cross-national comparisons: in Sweden and in the Netherlands, density has been calculated using the two methods (by sector and by sub-sector/occupation). The reason was to take account of the comments of experts. According to the Swedish expert, such a sub-sectoral density calculation provides a more reliable picture of real membership levels in the country concerned;
- in the case of certain countries like Italy, some sectoral density calculations haven't been carried out, as there are no specific sectoral employees data for these organisations;
- an organisation's effective importance is not necessarily directly linked to its level of membership; for example, even though membership is low in France and Spain, trade unions enjoy considerable legitimacy there.

Different typefaces distinguish and clarify the origins of all the data:

- **BOLD**: data from national experts

- **BOLD ITALICS**: data provided by European organisations or other bodies

- *ITALICS*: estimates based on available data

The 'employees' column to be found in all tables next to the 'country' column gives the number of employees throughout the sector.

The word *employees* refers to dependent workers, except where stated otherwise in national summaries, and thereby excludes owners, self-employed workers and working family members.

3. The actors

3.1 Employees: the European Federation of Food, Agriculture and Tourism Workers (EFFAT)

3.1.1 General features

The *European Federation of Food, Agriculture and Tourism Workers* (EFFAT) has been in existence since 12 December 2000 when the EFA (European Federation of Agricultural Workers' Unions) merged with the ECF-IUF (European Committee for Food, Catering and Allied Workers' Unions within the IUF). EFFAT is an autonomous European trade union federation. It is a member of the ETUC (European Trade Union Confederation), and is a regional organisation of the IUF (International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations). EFFAT is represented in 35 European countries. Affiliation is normally open to all free, autonomous, democratic trade unions in sectors lying within the competence of EFFAT at European level.

Structure¹²

EFFAT is made up of a number of bodies:

- **Congress:** Congress is EFFAT's supreme body. It meets every four years, and is responsible for receiving and approving the activity and financial reports and determining the organisation's overall policy. It also deals with the election of representatives. EFFAT's various member organisations are represented at the Congress in proportion to their membership, and according to a distribution key set out in the Rules.
- **The Executive Committee:** the Executive Committee is EFFAT's supreme body between Congresses. Meetings are held at least twice a year. Nominations of the representatives from each country are made after a previous vote by each country's member organisations, and according to a distribution key set out in EFFAT's Rules. The Executive Committee decides on the measures needed to implement the resolutions and programmes adopted by Congress, or by the Executive Committee itself. The Executive Committee also carries out certain tasks such as the nomination of EFFAT representatives to EU Consultative Committees.
- **The Management Committee:** the Management Committee decides on urgent action required to carry out policies determined by the Executive Committee. It meets at least four times a year. The Management Committee also deals with financial and administrative issues.
- **Sectoral Assemblies and Boards:** the Assemblies are formed to deal with sector-specific tasks, and include the Assembly on Agriculture, the Assembly on Food and the Assembly on Tourism; their main role is to implement the Federation's trade union objectives in the sectors concerned. As a rule, they meet at least once a year and/or as required. Each Assembly has a Sectoral Board and a Chairman/Chairwoman.
- **The Secretariat:** the Secretariat consists of the General Secretary and the Sectoral Secretaries. Its main task is to represent the organisation at the level of European Institutions, and to coordinate and develop sectoral and inter-sectoral dialogue and trade union work.

¹² Source: EFFAT, Rules agreed at the 1st EFFAT Congress, Luxembourg, 11 December 2000.

3.1.2 Representative base

Membership figures

Country	Employees	Name	Membership	Density*	CB	National affiliation	European affiliations (except EFFAT) – indirect
Austria	173,190	GHGPD	10,500	6%	Yes	ÖGB	ETUC
		GPA	NA	NA	Yes	ÖGB	ETUC
Belgium	107,534	SETCA	1,700	1.6%	Yes	FGTB-ABVV	ETUC
		Alimentation Horeca Services	14,186	13.2%	Yes	FGTB-ABVV	ETUC
		CCAS	21,300	19.8%	Yes	CSC-ACV	ETUC
		CNE-LBC	1,510	1.4%	Yes	CSC-ACV	ETUC
Denmark	79,083	RBF	24,500	31%	Yes	LO, KTO	EAL, ETUC
Finland	72,000	PAM	46,000	64%	Yes	SAK	Uni-Europa, ETUC
France	580,000	FGTA	3,500	0.6%	Yes	FO	ETUC
		FdS	2,500	0.4%	Yes	CFDT	ETUC
		CDS ¹³	3,500	0.6%	Yes	CGT	ETUC
		SNPHRBC ¹⁴	NA	NA	Yes	CFTC	ETUC
Germany	1,048,000	NGG	50,000	8%	Yes	DGB	ETUC
Greece	136,520	POEYTE	28,000	20.5%	Yes	GSEE?	ETUC
Ireland	80,000	SIPTU	6,700	8.4%	Yes	ICTU	ETUC
Italy ¹⁵	380,000	FILCAMS	156,000	41%	Yes	CGIL	Uni-Europa, ETUC
			15,000				
		FISASCAT	84,000	22.1%	Yes	CISL	Uni-Europa, ETUC
			15,000				
		UILTuCS	58,400	15.4%	Yes	UIL	Uni-Europa, ETUC
			15,000				
Luxembourg	9,987	Synd. Alim. et hôt – OGB-L	1,400	14%	Yes	CGT-L	ETUC
		LCBG	100	1%	No	LCBG	ETUC
Netherlands	321,000	FNV Horecabond	28,000	8.7%	Yes	FNV	ETUC
		CNV Bedrijvenbond	2,750	0.85%	Yes	CNV	ETUC
Portugal	142,504	SITese	4,443	3%	Yes	UGT, FETese	ETUC
		FESAHT	40,000	28%	Yes	CGTP-IN	ETUC
Spain	670,400	FECOHT-CC.OO	41,000	6.1%	Yes	CC.OO	Uni-Europa, ETUC
		FETese-UGT	12,000	1.8%	Yes	UGT	Uni-Europa, ETUC
		FETA-ELA	2,000	0.3%	Yes	ELA	ETUC
Sweden	87,453	HRF	61,000	70%	Yes	LO	ETUC
		HTF	6,420	7.3%	Yes	TCO	Eurocadres, ETUC
United Kingdom	1,068,000	TGWU	8,100	0.8%	Yes	TUC	ETUC
		GMB	10,000	0.94%	Yes	TUC	ETUC
		USDAW	1,200	0.1%	Yes	TUC	ETUC

Note: Figures in bold have been provided by our experts and are there for reference. With a few exceptions, we reproduce figures from European organisations (in italic bold) in the absence of our own data.

¹³ CDS: our acronym for Commerce-distribution-service.

¹⁴ Syndicat National Personnel des Hôtels, Cafés, Rest. Bars, Collectivités.

¹⁵ Data from the experts refer the total membership of the sectoral association, but excluding trade and distribution workers. The data therefore account for hotel, restaurant and bar workers, and for workers in other services. Data provided for the sector by European organisations are in italics.

3.1.3 Recognition

The EFFAT branch that relates to the Horeca sector, has 32 affiliated trade unions across 15 member countries of the European Union. If we exclude Italian staff (we do not have reliable figures for the number of employees), that represents about 435.000 employees, and to that we must add figures missing for employees of the GPA in Austria and the *Syndicat National du Personnel des Hôtels, Cafés, Rest. Bars, Collectivités* in France. The EFFAT branch therefore enjoys a virtual monopoly in the Horeca sector at European level.

All trade union members of EFFAT are themselves affiliated directly or indirectly (via their national affiliation) to the ETUC; EFFAT affiliates can also be considered to be indirectly affiliated to the ETUC via EFFAT's direct affiliation to the ETUC.

All trade unions affiliated to EFFAT, with the exception of the LCGB in Luxembourg, are involved in the negotiating of collective agreements.

Representativeness challenged

There are trade unions that take part in collective bargaining in addition to those affiliated to EFFAT, but there are only about 3 of them. These organisations do not come under the EFFAT umbrella, and are not covered by any other European sectoral body. They represent a total of about 7.450 members. We are therefore talking about an insignificant minority of employees in the sector, and EFFAT's representativeness cannot be said to suffer from the fact that this small number of trade union representative organisations are not in membership.

Non-EFFAT member organisations involved in the negotiation of agreements

Country	Employees	Name	Membership	Density*	CB	National affiliation	European affiliations (except EFFAT) – indirect
Belgium	107,534	CGSLB	3,200	3%	Yes	CGSLB-ACLVB	CESI
France	580,000	SYNARHES	2,300	0.4%	Yes	CGC	FEDEPICA, CEC
Netherlands	321,000	LBV-OBV	1,950	0.6%	Yes	-	-

3.1.4 Conclusion

EFFAT and its tourism branch in the Horeca sector therefore have a virtual monopoly over representation of employees at European sectoral level. Its representativeness is not in question.

The employers

3.2 HOTREC, The Confederation of the National Associations of Hotels, Restaurants and Cafés and Similar Establishments in the European Union and European Economic Area

3.2.1 General characteristics

This organisation is represented by employers' associations in 18 European countries, 14 or 15 of which are member countries of the European Union. Of EU countries, only Luxembourg does not have a member association. HOTREC's main task is to represent the interests of the Horeca industry on the European stage.

Members of the confederation

The confederation is composed of organisations that represent owners and employers in the hotel, restaurant and cafe industry and similar industries in the EU, that are recognised by HOTREC and are legal entities.

Structure

General Assembly: the General Assembly is composed of HOTREC members. It has full powers. The General Assembly is held once a year at a place determined by the preceding General Assembly.

All full members have equal voting rights in the General Assembly. If several organisations of the same country are members of HOTREC, they share the membership. Each country represented in the Confederation and allowed to vote has only one vote. Resolutions are passed by a simple majority of those present, unless otherwise stated in the current Statutes.

Executive Committee: Management of the association is carried out by the Executive Committee made up of six members appointed by the General Assembly for a two-year term. Each member may be appointed only once to a given post (i.e. President, Vice-President, Treasurer and Member). The Executive Committee consists of the President, the Vice-President, the Treasurer and three representatives, thereby ensuring representation of six countries. The Secretary General attends Executive Committee meetings.

The Executive Committee has authority in matters of administration and management of the Confederation. The Executive Committee meets at least twice a year at the official seat of the Confederation. It can take valid decisions only when at least four members are present. Decisions are taken by simple majority. The President has a casting vote in the event of a tied vote.

3.2.2 Representative base

Membership figures

Country	Employees	Employers	Companies	Employees	Density	NC	National affiliation	European – affiliations (apart from HOTREC) – indirect
Austria	173,190	FVH	9,832	73,406	42.3%	Yes	WKÖ	UEAPME
		FVG	21,895	99,784	57.6%	Yes	WKÖ	UEAPME
Belgium	107,534	Ho.Re.Ca.	9,300	NA	NA	Yes	-	-
Denmark	79,083	HORESTA	1,700	52,500	66.4%	Yes	DA	UNICE
Finland	72,000	FHR	2,244	38,000	53%	Yes	PT	UNICE
France	580,000	UMIH	79,000	250-280,000	45%%	Yes	MEDEF, CGPME, CGAD, UAP	UNICE
Germany	1,048,000	DEHOGA	90,000	830,000	79%	Yes	BDA	UNICE
		IHA-D	750	50,000	4.8%	No	-	-
Greece	136,520	POX	NA	NA	NA	Yes	-	-
Ireland	80,000	IHF	850	NA	NA	No	-	-
		(RAI**)	450	40,000	50%	No	-	-
Italy	726,681	Confiturismo (Federalberghi – Fipe)	200,000	950,000*	NA	Yes	Confcommercio	Eurocommerce, Ho.Re.Ca, FERCO
Luxembourg	9,987	-	-	-	-	-	-	-
Netherlands	321,000	KHN	18,000	185,000	57%	Yes	VNO-NCW	UNICE
Portugal	142,504	UNIHRNOR	7,500	NA	NA	Yes	CIP	UNICE
		FIHOTEL	NA	NA	NA	Yes***	-	-
Spain ¹⁶	670,000	FEH	8,000	100,000	NA	Yes	CEOE	UNICE
		ZONTUR	3,000	100,000	NA	Yes	CEOE	UNICE
Sweden	87,453	SHR	4,150	41,000	47%	Yes	Sveskst Näringsliv	UNICE
United Kingdom	1,068,000	BHA	30,000	425,000	47%	Yes	CBI	FERCO, UNICE

* These data refer to the total number of workers represented by general organisations (Confcommercio and Confesercenti), including workers in trade and distribution.

**The Restaurant Association of Ireland is a trade association

***FIHOTEL do not take part directly in collective bargaining but has 7 regional member organisations that participate to collective agreements.

HOTREC membership consists of about 19 organisations in 14 of 15 member countries of the European Union. On behalf of its national affiliates, HOTREC plays a central role on the European sectoral bargaining stage in the Horeca sector. It is estimated that there are more than XXXXX employees altogether in enterprises that are members of employers' associations affiliated to HOTREC. It is not possible to put a more accurate figure on it as for some of these organisations, we only have the number of affiliated enterprises, a number of workers in a sector, or a broader series of activities of which the organisation is the representative.

The overwhelming majority of national employers' associations in membership of Horeca are involved in collective bargaining. Only the British and Irish organisation members of HOTREC, because of the bargaining processes in those countries, are not directly involved in collective bargaining. A German

¹⁶ Figures for employees include employees but certainly include also self-employed-professionals, firm owners and family members.

organisation (IHA-D) does not take part in negotiations either, but this does not pose a major problem of representativeness as the organisation represents most German employers, and a HOTREC member take part in collective bargaining. Because of the negotiating process in Britain and Ireland, it is natural not to have employers' associations really taking part in collective bargaining in those countries.

In parallel with member organisations of HOTREC there is a small number of organisations taking part in collective bargaining that are not members of HOTREC, but which are represented at European level via FERCO. As stated above, member organisations of FERCO are in a special category of Horeca's activity (i.e. contract catering). We will refer to them in detail in section 3.3, which is devoted to FERCO.

3.3 European Federation of Contract Catering Organisations - FERCO

3.3.1 General characteristics

Generally speaking, the aim of the Federation is to promote the contract catering sector in Europe; its main objective is to provide its members with information on developments at European level that might affect the contract catering sector. The Federation therefore has to know about its members' needs and actions, and act in concert with them, particularly in respect of the EU authorities.

FERCO represents nine organisations, each from a different country of the European Union. Contract catering covers all activities involved in the preparation and provision of meals for people working and/or living in places such as enterprises, administrations, schools, hospitals and all other public and private bodies that have to feed people using the premises, and offer associated support services and managerial skills under the terms of a contract concluded with the clients referred to above.

Membership

Only professionally representative organisations may join the Federation. Membership is limited to one organisation per country.

Structure

FERCO incorporates the following bodies:

The General Assembly: The General Assembly determines general policy, conducts elections, and oversees the Federation's general activity. It meets at least once a year in a different country represented in the Federation's membership. An Extraordinary General Meeting may be called at the request of at least a quarter of members with voting rights.

The General Assembly consists of delegates accredited by member organisations. There may be no more than two delegates from each organisation, but each organisation has only one vote.

The General Assembly may have valid deliberations only if Federation members present, or represented, hold at least half of the votes. Except in circumstances provided for under legislation and regulations currently in force, or under these Federation's rules, the General Assembly must seek unanimous support on all matters referring to Federation policy.

The President: The President is introduced by a member organisation of the Federation. He is elected for a renewable period of two years. He is responsible to the Federation's General Assembly and represents the Federation before third parties. He exercises all of the Federation's executive powers, but may delegate some of these powers to the Vice-Presidents and General Secretary.

The Vice-Presidents: There are three Vice-Presidents. The President and each of the Vice-Presidents belong to different groups.

The General Secretary: The post of General Secretary is held by a person or an organisation, and is a permanent function of the Federation. The General Secretary is delegated by the President to conduct day-to-day affairs entrusted to him, and looks after the Federation's accounts.

3.3.2 Representative base

Membership figures

Country	Employees	Name	Companies	Employees	Density	NC	National affiliation	European affiliations (apart from FERCO) indirect
Belgium	107,534	UCB	NA	5,357	5.15%	No	-	-
France	580,000	SNCR	NA	65,000	11.2%	Yes	-	-
Germany	1,048,000	VIC	6	50,000	4.8%	No	-	-
Ireland	80,000	AICC	NA	7,195	9%	No	-	-
Italy	380,000	ANGEM	NA	16,607	4.4%	Yes	Confturismo	Eurocommerce, HOTREC, Ho.Re.Ca
Netherlands	321,000	VENECA	12	30,000	9.3%	Yes	VNO-CNW	ECA, UNICE
Portugal	145,504	ARESP	NA	45,000	31%	Yes	FIHSP	-
Spain	670,400	FEADRS	NA	22,500	3.5-4%	Yes	FEHR, CEOE, CEPYME	UNICE, UEAPME
United Kingdom	1,068,000	BHA	NA	425,000 ¹⁷	40%	No	CBI	HOTREC, UNICE

3.3.3 Recognition

FERCO is currently only represented in 9 of the 15 member countries of the European Union; a tenth country, Luxemburg, may join soon. FERCO is unquestionably an important actor in sectoral social dialogue in the Horeca sector, but it is not easy to assess how really far some of the members are involved in concluding collective agreements in their countries. In fact, some of them (ANGEM in Italy, ARESP in Portugal and FEADRS in Spain) are only involved in collective bargaining through national sectoral organisations, which in one case (Confturismo via Fipe) is itself a member of HOTREC. In other countries (Germany, Ireland and the United Kingdom), member organisations of FERCO should be seen more as trade organisations as they leave it to the large enterprises affiliated to them to negotiate collective agreements with workers in their companies.

¹⁷ Figure communicated by European organisation FERCO : 161,065

Other organisations that are not members of the two European organisations HOTREC and FERCO are involved in collective bargaining in their countries. They are set out in the table below:

Organisations not members of HOTREC and FERCO, but involved in negotiating agreements

Country	Employees	Name	Companies	Employees	Density	NC	National affiliation	European affiliations – indirect
Belgium	107,534	Bemora	10	15,000	14%	Yes	-	EMRA
France	580,000	CPIH	NA	NA	NA	Yes	-	-
		UNIHR	81,400	NA	NA	Yes	-	-
		FNIH	NA	NA	NA	Yes	-	-
Germany	1,048,000	BdS ¹⁸	NA	NA	NA	Yes	-	-
Greece	136.250	PFR0 ¹⁹	NA	NA	NA	Yes	-	-
		ARBOA ²⁰	NA	NA	NA	Yes	-	-
Ireland	80,000	IBEC	200	NA	NA	Yes	IBEC	UNICE
Italy	380,000	Fedetursimo	NA	NA	NA	Yes	Confindustria	UNICE
		Assoturismo	40,000	364,000*	NA	Yes	Confesercenti	-
Luxembourg	9,987	Horesca	NA	NA	NA	Yes	CCMUEL ²¹	-
Netherlands	321,000	NHG	350	8,000	2.5%	Yes	MKB-Nederland	UEAPME, Eurocommerce
		RECRON	1,400	18,000	5.6%	Yes	-	EFCO
Portugal	142,504	AHETA	270	NA	NA	Yes	CTP ²²	-

* These figures refer to the total number of workers represented by general organisations (Confcommercio and Confesercenti), and include workers in trade and distribution.

These organisations are not in membership of HOTREC or FERCO, and are not covered by any other European sectoral organisation. Although we do not have accurate figures for the number of employees in the Horeca sector covered by these various organisations, those listed above can only represent a minority of employees in the sector at European level.

3.3.4 Conclusion

The only key actor present on the European sectoral dialogue stage in Horeca for the employers generally is HOTREC.

¹⁸ BdS : our acronym for Bundesverband der Systemgastronomie

¹⁹ PFR0 : our acronym for Panhellenic Federation of Restaurants Owners

²⁰ ARBOA : our acronym for Association of restaurants-owners and beer-restaurants owners of Attica

²¹ CCMUEL : our acronym for Confédération des Classes Moyennes , Union des Entreprises du Luxembourg

²² CTP : our acronym for Confederação do Turismo Português

4. National summaries

4.1 Austria

Contextual data

The sector recorded 173.190 employees of which 13.4 % and 86.6 % were white-collar workers and blue-collar workers, respectively (1996). For the same year 54.477 businesses were registered of which 31.727 had employees. Hence the difference (i.e. 22.750 businesses) can be regarded as self-employed professionals.

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
54.477	41.7%	46%	0.3%	173.190	78.909	16.575	100%

There are two unions and two employers' organisations which are engaged in collective bargaining. The employers' organisations involved are the *Fachverband Hotellerie - FVH* and the *Fachverband Gastronomie - FVG* as well as their Länder subunits (i.e. the Fachgruppen).

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Fachverband Hotellerie - FVH	Hotels, inn and restaurants with accommodation > 8 beds, pension, guest houses.	9.832	73.406	(100% for the sub-sector)	Yes	WKÖ	HOTREC, UEAPME
Fachverband Gastronomie - FVG	Inns, restaurant with accommodation <8 beds, cafes and other sectoral businesses	21.895	99.784	100% for the sub-sector)	Yes	WKÖ	HOTREC, UEAPME

The union side is represented by the Union of the White-Collar Workers of the Private Sector (*Gewerkschaft der Privatangestellten - GPA*) and by the Union of the Blue-Collar Workers of Hotels, Restaurants, and Personal Services (*Gewerkschaft Hotel, Gastgewerbe und Persönlicher Dienst - GHGPD*).

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density*	CB	National affiliation	European affiliation - indirect
<i>Gewerkschaft der Privatangestellten - GPA</i>	White collars	NA	(Est. 30%)**	Yes	ÖGB	EFFAT, ETUC
<i>Gewerkschaft Hotel, Gastgewerbe und Persönlicher Dienst - GHGPD</i>	Blue collars	10.500	6%	Yes	ÖGB	EFFAT, ETUC

** density estimated by the national expert

In terms of the bargaining level, the standard collective agreement is sectoral. The coverage of these sectoral agreements coincide with the sector's statistical demarcation.

Separate collective agreements are concluded for the white-collar employees and the blue-collar employees by the GPA and the GHGPD, respectively. As regards employers, the FVH and the FVG traditionally combine to bargain. Hence, there are two bargaining cartels: one for white-collar workers which sees the GPA and the FVH and the FV/G as the counterpart, and the other one for the blue-collar workers whose agreements are concluded jointly by the FVH and the FVG on the one hand and by the GHGPD on the other. In addition, the bargaining system is differentiated by territory and by issues. For certain issues, separate collective agreements are concluded on behalf of each single Land. These agreements are (again jointly) negotiated by the Länder subunits of the FVH and the FVG. There are also collective agreements which cover the whole country.

However, special collective agreements are concluded for a few firms. This involves both white-collar and blue-collar workers. Although these collective agreements are single-employer settlements in terms of coverage, they are nevertheless concluded by the two employer associations on behalf of these companies in all cases. This is because Austrian law equips single firms with the right to conclude collective agreements only in exceptional cases, by explicitly listing the respective companies. No company of this sector is listed, such that the employer associations have a bargaining monopoly.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.2 Belgium

Contextual data

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
50.242	+/-60%	88%	0.23%	107.534	47.288	10.785	100%

In 1999, 107.534 people were working in this sector (ONSS 2001 for NACE 55). At the same period, one counts 19.775 employers for 20.546 companies.

If we refer to INS figures, there are for the sector NACE 55.1, 55.3 and 55.4, 50.242 companies. The difference with the ONSS figures depends on whether or not the independent workers are taken into account.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Fédération Ho.Re.Ca	All	9.300	NA	NA	Yes	-	HOTREC
Bemora	Fast food industry	10	15.000	14%	No	-	EMRA**
Union Belge du Catering - UBC	Contract catering	NA	5.357	5%	No	-	FERCO

**EMRA: European Modern Restaurants Association

The Ho.Re.Ca. Federation is divided into three regional branches: The Fédération Horeca Vlaanderen; the Fédération Horeca Wallonie and the Fédération Horeca Bruxelles-Brussel. They affiliated respectively 6.800, 2.200 and 300 companies of the sector.

Bemora is an other employers' organisation. Bemora represents a gathering of companies of chain restaurants.

Horeca collective bargaining takes place within a joint sectoral committee (*Commission Paritaire 302*). But Bemora does not participate to this Joint Committee 302 and UCB takes part in the collective negotiation only via the representation of one of its members who sits at Ho.Re.Ca

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirect
Alimentation Horeca Services	Socialist blue collar	14.186	13,2%	Yes	FGTB – ABVV	EFFAT, ETUC
SETCA-FGTB	Socialist white collar	1.700	1,6%	Yes	FGTB – ABVV	EFFAT, ETUC
Centrale Chrétienne de l'alimentation et des services – CCAS	Christian blue collars	21.300	19,8%	Yes	CSC – ACV	EFFAT, ETUC
Centrale Nationale des Employés – CNE / Landelijke Bedienden Centrale – LBC	Christian white collars	1.510	1,4%	Yes	CSC – ACV	EFFAT, ETUC
CGSLB	Liberal workers	3.200	3%	Yes	CGSLB – ACLVB	CESI

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.3 Denmark

Contextual data

Data refers to hotel and restaurant/café sector (NACE 55.1, 55.3 and 55.4). 79.083 dependent workers were employed in these sectors, and 10.452 self-employed professionals (year 2000).

Companies	Of which % <10 employees	Of which % >100 employees	Employees	Coverage
11.338	55%	0.44%	79.083	+/-25%*

*In term of companies

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Hotel- Restaurant- og Turisthvervets Arbejdsgiverforening – HORESTA	Hotels, restaurants	1.700	52.500	66.4%	Yes	DA	HOTREC, UNICE

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirect
RestaurationsBranchens Forbund – RBF	Gastronomers, waiters, hotel and restaurant staff	24.500	31%	Yes	LO, KTO	EFFAT, EAL, ETUC

Collective bargaining

Collective bargaining takes places between the employers' association HORESTA, (The Association of the Hotel, Restaurant, and Leisure Industry in DK – *Hotel- Restaurant- og Turisterhvervets Arbejdsgiverforening*) who is the national employers' trade association and the labour organisation RBF (*RestaurantsBranchens Forbund* - The union of employees in the restaurant and leisure industry), the national labour organisation for employees entire sector.

In addition to this RBF has so-called 'adhesion agreements' (or 'adoption' agreements) with around 2.200 companies without membership of an employers' association. This means that only approximately 25% of the companies/businesses within the sector are covered by collective agreements. In spite of this, the companies covered by a collective agreement make up about 75% of the annual turnover in the sector. There exists several collective agreements divided by sub-sector and employer.

The relative low degree of unionisation compared to the Danish standard (80% at national level) might be caused by the following factors:

- the sector is characterised by a high labour turnover partly due to many students working in the sector, partly due to seasonal changes. Furthermore many employees choose to leave the sector after having children because of the working hours (nights and weekends).
- the composition of the labour force in the sector. 40% of the employees is working part-time, many employees is working in weekends and/ or are seasonal workers. In the high season 'double workers' (people working two places at the same time) might be found.
- a great majority of employees in the sector has not got educational skills related to the sector. 57% of the employees in the hotel sector and 64% of the employees in the restaurant sector are unskilled, according to RBF. During the recent years the number of skilled employed has been rising. It is possible that an increase in the number of skilled employees would lead to a higher level of union density.

Challenge of representativeness

RBF representativeness has been challenged by the Christian Workers' Union: the latter is a so-called 'yellow' union, that is not recognised as an actor among the social partners and the government. But at the restaurants in Nyhavn, a well known and crowded locality in central Copenhagen, the employers/owners would not conclude an agreement with RBF. Instead, and meant as a provocation, they went to the Christian Workers' Union and concluded an agreement for the employees with them. RBF is the only union in the restaurant and leisure industry.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.4 Finland

Contextual data

Hotel, restaurants and cafes are employing about 72.000 people in Finland according to the NACE statistics. The number of unionised employees is about 55-60 %. In the beginning of 1990s about 30 % of jobs disappeared because of the recession. At the moment employment level is a bit lower than before the recession.

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employees (% full employment)	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
4.300	2%	55%	3%	72.000	71%	42.000	5.000	95%

In the hotels, restaurants and cafes there is one big union on the employers' and employees' side. Employers are represented by the *Majortus- ja Ravitsemusalan Työntajat MARA* (Finnish Hotel and Restaurant Association) and employees are represented by the *Palvelulojen Ammattiliitto PAM* (Service Union United).

In union organisation there happened a big change in 2000 when four service sector unions merged to former this big union called the *Palvelulojen Ammattiliitto - PAM*. It has 202.000 members, from which 45.000 members are working in the hotels, restaurants and cafes.

Unions negotiate one agreement for blue collar employees and one for white collars. This collective agreement covers also non-unionised employees and employers in the hotels, restaurants and cafes. Coverage of agreement is 95 %.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Majortus- ja ravitsemusalan työntajat (Finnish Hotel and Restaurant Association) - FHR	hotels, restaurants, cafes	2.244	38.000	53%	Yes	PT	HOTREC, UNICE

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirect
Palvelulojen Ammattiliitto PAM; (Service Union United)	blue and white collar workers	46.000	64 %	Yes	SAK	EFFAT, Uni-Europa, ETUC

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.5 France

Contextual data

The total number of companies is about 202.000 in the sector. Only 5% of them have more than 10 employees but it employs 320.000 employees and represents 55 to 60% of the salaried workers in the sector. Seasonal workers are about 200.000, that is corresponding to 20% of the employment in the sector.

Companies	Of which % without employees	Of which % <10 employees	Employees	Employment in companies <10 employees	Coverage
202.000	49,5%	95%	+/-580.000	45%	100%

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirect
Confédération des Professionnels Indépendants de l'Hôtellerie – CPIH	Hotels	NA	NA	NA	Yes	-	-
Fédération Nationale de l'Industrie Hôtelière – FNIH	Hotel industry	NA	NA	NA	Yes	-	-
Union des Métiers de l'Industrie de Hôtellerie – UMIH ²³	Hotel industry	79.000	250.000-280.000	45%	Yes	MEDEF, CGPME, CGAD, UPA	HOTREC, UNICE
Union Nationale des Indépendants de l'Hôtellerie et de la Restauration – UNIHR ²⁴	Hotels, restaurants	81.400	NA	NA	Yes	-	-
Syndicat National de la Restauration Collective – SNRC	Contract catering	NA	+/-60.000	10%	Yes	-	FERCO

²³ The *Union des Métiers de l'Industrie de l'Hôtellerie* (UMIH) gather all these organisations: The *Fédération Nationale des Cafés, brasseries, discothèques* (FNGBD), the *Fédération Nationale de la restauration française* (FNRF), the *Fédération Nationale de l'Hôtellerie Française* (FNHF), the *Fédération de l'Hôtellerie Familiale Nationale* (FFFN), the *Fédération Nationale des Professions Hôtelières Saisonnnières* (FNPHS), the *Groupement Nationale des Chaînes* (GNC) who gather itself the union SNC and the union Asmotec (low cost hotels). According to the expert, these organisations also belong to the UMIH: the *Syndicat Français de l'Hôtellerie* (SFH), the *Syndicat National des Restaurateurs, Limonadiers et Hôteliers* (SNRLH) and the *Syndicat Nationale de la Restauration Publique Organisée* (SNRPO).

²⁴ The *Union Nationale des Indépendants de l'Hôtellerie et de la Restauration* (UNIHR) gather these two organisations : The *Confédération Française des Hôteliers, Restaurateurs, Cateleurs et Discothèques* (CFHRCD) and the *Fédération Autonome Générale de l'Industrie Hôtelière et Touristique* (FAGIHT).

Concerning collective bargaining, there are different agreements concluded by subsector. The national agreement for the Hotels, Cafés and Restaurants (HCR) was signed in 1997. This important step was signed by all the employers' organisations (FINH, FAGITH, GNC, SFH, SNRLH, SNRPO and the CFHRCD has just joined them) and the following trade unions: CFDT, FO and the CGC. This collective agreement was extended by law at 3rd December 1997.

The next great challenge was the reducing of the legal work time to 35 hours. When they had to approve the legal extension, some difficulties appeared and the MEDEF, the CGPME, the UPA, the FNSEA and the UNAPL on the employers side were against the agreement. On the trade unions side, only two unions (CGT and CFDT) signed this agreement with two employers' organisations (the SFH and the SNRLH). The disagreement is still present an in the interest of both parts, SFH and SNRLH try to negotiate and maintain the social dialogue.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirect
Syndicat National de l'Hôtellerie- Restauration et des Sports – Confédération Française de l'Encadrement CGC	Professional and managerial staff	2.300	<i>0.4%</i>	Yes	CGC	FEPELICA, CEC
SYNARHES – CFE-CGC						
Fédération Nationale des Travailleurs de l'Agriculture, de l'alimentation, des tabacs et des activités annexes –Force Ouvrière- FGTA-FO	All	3.500	<i>0.6%</i>	Yes	FO	EFFAT, ETUC
Commerce-distribution-service – CGT	All	3.500	<i>0.6%</i>	Yes	CGT	EFFAT, ETUC
Syndicat National Personnel des Hôtels, Cafés, Rest. Bars, Collectivités – CFTC	Christian workers	NA	NA	Yes	CFTC	EFFAT, ETUC
Fédération des Services – FdS-CFDT	All	2.500	<i>0.4%</i>	Yes	CFDT	EFFAT, ETUC

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.6 Germany

Contextual data

The hotel, restaurant and cafés sector employed 1.048.000 people in 1999. A high proportion of the employees was foreigners (26.6%). Compared to other sectors, one can find a high proportion of part-time employees (29.8%). Only 650.000 employees are covered by social security.

A majority of workers (about 52%) in this sector were employed in companies with 10 or more employees (data for year 1997).

Companies	Of which % <10 employees	Employees	Employment in companies <10 employees	Coverage
195.196	88%	1.048.000* (year 1999)	48%	40%-99%**

*This number must be handled with great caution. According to Eurostat, the number of employees for 1998 was 845.000.

** According to the trade union NGG, half of all employees covered by social security, work under working conditions regulated by a collective agreement. According to employer association DEHOGA, one can observe a much higher coverage, it estimate an almost full coverage.

In Germany collective bargaining generally takes place at the sectoral and regional level between unions and employers' associations, but there are also collective agreements at company level. In the hotel, restaurant, café sector collective agreements are negotiated at regional level (Bundesland) or at national level. Most collective agreements are declared generally binding (*allgemeinverbindlich*). Several collective agreements are in force in the NACE 55 sector. Eleven of these were declared generally binding.

The actors of collective bargaining are the trade union *Gewerkschaft Nahrung-Genuss-Gaststätten* (NGG) which is usually translated with "Food, Drink, Tobacco and Catering Union" and two employers associations. The larger employers association is the *Deutsche Hotel- und Gaststättenverband* (DEHOGA) (German Hotel and restaurant Association) and the much smaller association for the sub-sector chain restaurants the *Bundesverband der Systemgastronomie*. But DEHOGA covers also workers in chain restaurants.

Management organisations negotiating collective agreements

<i>Employers</i>	<i>Type of companies covered</i>	<i>Companies</i>	<i>Employees</i>	<i>Density*</i>	<i>CB</i>	<i>National affiliation</i>	<i>European affiliation - indirect</i>
Deutsche Hotel- und Gaststättenverband – DEHOGA	Hotels and restaurants	90.000	830.000**	79%	Yes	BDA	HOTREC, UNICE
Bundesverband der Systemgastronomie	Chains restaurants	NA	NA	NA	Yes	NA	NA
Hotelverband Deutschland - IHA-D	Hotels	750	50.000	4,8%	No	-	HOTREC
Verband der Internationalen Caterer in Deutschland - VIC	Contract catering	6	50.000	4,8%	No	-	FERCO

**This figure must be taken with great caution (it can cover a larger population than employees)

The larger union is DEHOGA. DEHOGA has 17 regional member association. Almost 90,000 companies (with a workforce of 830,000 employees) are members of DEHOGA, which is roughly 40 % of all relevant companies. A high proportion of all employees is working in companies affiliated to this association. The reason of such high proportion lies the fact that most of the comparatively large enterprises are organised in DEHOGA.

Beside these unions, there is a fourth organisation, The "Verband der Internationalen Caterer in Deutschland" (VIC). It was founded in September 2000 and is a lobby for big catering companies in Germany. It is not involved in collective bargaining, it just represents the general interests of its members and conducts public relations for them.

Labour organisations negotiating collective agreements

<i>Employees</i>	<i>Types of employees covered</i>	<i>Members</i>	<i>Density</i>	<i>CB</i>	<i>National affiliation</i>	<i>European affiliation - indirect</i>
Gewerkschaft Nahrung-Genuss-Gaststätten – NGG	All	50.000	8%	Yes	DGB	EFFAT, ETUC

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.7 Greece

Contextual data

Hotels, restaurants and cafés constitute an important and expanding sector in the Greek economy, employing over 6% of total employment. According to the official data, in 1999 (2nd quarter), there were 252.812 workers in the sector: 147.601 men and 105.211 women. Of these, 54% are dependent workers, 19.1% are self-employed, 14.1% are unpaid family members, and 12.7% are employers. Women are over-represented as unpaid family members and under-represented as employers.

The majority of firms in the hotels-restaurants-catering sector are family-run small businesses. There exist no recent data on the total number of establishments: the last census carried out by the National Statistics Office in 1988 and published in 1998 reported 62 800 restaurants, bars, coffee-shops, etc. A 1999 survey on the hotel industry reports 8072 hotels and 344 campings. Of these, family hotels (1-20 beds) and small hotels (21-50 rooms) constitute 43% and 37% respectively of total room capacity, whilst larger hotels only 7%.

Companies	Employees	Coverage
> 71.000*	136.520	NA

*There exist no recent data on the total number of establishments

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirect
Panhellenic Federation of Hoteliers – POX	Hotels	Around 95% of the hotel industry	28.000 2.000	20.5%	Yes	-	HOTREC
Panhellenic Federation of Restaurants owners	Restaurants	NA	NA	NA	Yes	-	-
Association of Restaurants-owners and Beer-restaurants owners of Attica	Bars, restaurants, confectioneries and catering industry	NA	NA	NA	Yes	-	-
(Federation of Confectioners)**	Confectioners	NA	NA	NA	Yes	-	-

**This organisation is mentioned because it takes part in collective agreements negotiated for restaurants and confectioneries.

The Panhellenic Federation of Hoteliers represents primary professional associations (consisting of individual, self employed as well as representatives of companies) from the hotel business, organised in 58 local hotel associations from all over Greece. Only one local association is not represented (Pieria). It is estimated that these 58 local associations represent around 95% of the hotel industry professionals.

Over these organisations, The Hellenic Chamber of Hotels (HCH) is an umbrella organisation for all hotel businesses and organised campings, providing technical advice and consultancy services to its members. It does not have social partners' status. The Hellenic Chamber of Hotels is a member of HOTREC.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density*	CB	National affiliation	European affiliation - indirect
Panellinia Omospondia Ergaton						
Epistismou Kai Ypallilion Touristikou	All	28.000	20.5% (12% ^{**})	Yes	GSEE	EFFAT, ETUC
Epagelmatou – POEE-YTE						

** Density estimated in the sector by the national expert

There are different collective agreements concluded in the sector:

One of the agreements covers all personnel working in hotels, guest-houses, furnished rooms, motels, bungalows, etc. and campings (including on-call personnel for hotel receptions and buffet-diners); a separate agreement covers employees working in restaurants, pubs, bars, coffee-shops, catering firms, etc This one was signed in June 2001.

Workers employed in confectionery workshops (also represented by the same union as the other categories of workers) are covered by a special occupational agreement. The special occupational agreement with confectionery workshop has been concluded for a two year period at the end of 2001.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.8 Ireland

Contextual data

The total amount of employment in this sector is about 110.000 people (data year 2000-2001)²⁵ According to Eurostat data, there were 80.000 employees in the sector in 1998.

According to the CERT Survey tourism industry, 89% of workers in hotels in Ireland are permanent employees, and in the restaurants sector, 84% are permanent (other workers are seasonal or occasional workers). This survey provides employment figures for hotels and restaurants but not catering industry. In 2000, one counts 57.397 hotels and 43.268 restaurants.

Employees	Employees (% full employment)	Coverage
+/-80.000*	+/-75 %	-

*Source Eurostat 1999 for 1998

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirect
Irish Business and Employers Confederation – IBEC	All	200	NA	NA	Yes	IBEC	UNICE
Small Firms Association – SFA	Small firms	45	NA	NA	No	IBEC**	UEAPME
Irish Small and Medium Enterprises – ISME	Small and medium enterprises	NA	NA	NA	No	SFA	-
Irish Hotel Federation – IHF	Hotels	850	NA	NA	No	-	HOTREC
Association of the Irish Contract Caterers - AICC	Contract catering	NA	7195	9%	No	-	FERCO
(The Restaurant Association of Ireland - RAI)***	Restaurant industry	450	40.000	50%	-	-	HOTREC

** Although it is formally part of IBEC, the SFA has an independent status, *** The Restaurant Association of Ireland is a trade association.

²⁵ The employment data are for the NACE economic sector 55.

Collective bargaining takes place in the context of the centralised national level agreements, which have been in place in Ireland since 1987. National agreements are negotiated and signed by IBEC, ICTU, the Government and a number of representatives from the voluntary and community sector. The agreements set out universally applicable pay increases, to be implemented at the local level by management and trade unions. Collective bargaining takes place with regard to the implementation of these pay increases at the company level in the hotels, restaurants and catering sector between management and trade union representatives.

There exists no employers' organisation specific to the hotels, catering and restaurants sector in Ireland. Many of the companies in this sector are members of the Irish Business and Employers Confederation (IBEC), which is the largest employer organisation in the country.

A number of establishments in this sector hold membership of the Small Firms Association. Although it is formally part of IBEC, the SFA has an independent status. Other companies in the industry hold membership of Irish Small and Medium Enterprises (ISME). ISME represents small and medium enterprises in every part of the private sector, excluding agriculture. However, the SFA and the ISME do not represent its members in negotiations with trade unions at a local level.

The Irish Hotels Federation is classified as an 'employer association' by the Labour Relations Commission. It represents management in the vast majority of establishments in the hotels sector. Although the IHF does make submissions to the national agreements' discussion forums, it is not party to the negotiations of national agreements.

The Restaurant Association of Ireland (RAI) is a trade association in the restaurant industry 450 members. As is visible from the large membership rates for both the IHF and the RAI, these are influential organisations in the hotels, catering and restaurants sector, and play a more important role than trade associations in other sectors.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density*	CB	National affiliation	European affiliation – indirect
The Service, Industrial, Professional and Technical Union - SIPTU	All	6,700 3,000	8.4%	Yes	ICTU	EFFAT, ETUC
Mandate, Union of Retail, Bar and Administrative Workers	Bar workers and retailers	NA	NA	No	-	-

The Services, Industrial, Professional and Technical Union (SIPTU) is the only trade union recognised by the Irish Congress of Trade Unions (ICTU) and the employer organisations as representing employees in the hotels, catering and restaurants sector. SIPTU represents a total of 6,700 employees in these industries, with approximately 5,000 of these working in the Dublin region.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.9 Italy

Contextual data

The Horeca sector gathers a wide group of firms, specialised in different activities, and many of them are related to tourist activities. It employs about 726.700 workers. If we consider the class 55 of the Nace Classification, we note the prevalence of small-scale firms: (37% of the total number of firms has only one employee). At the same time, this is a sector characterised by a high proportion of 'seasonal' workers. These two main features influence the membership rate for trade unions, which is not particularly high in this sector. A large quota of small firms is represented by cafés: it accounts for about 50% of firms with less than 10 employees in the Horeca sector.

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
226.022		95,6%	0,1%	380.000*	70,7%	4,7%	NA

Source: Processed data from Istat database from the 1996 Census' archive

*Data based on Eurostat 1998 for 1999.

Workers and employers organizations haven't a specific federations which gather exclusively workers of Horeca sector and at the same time in Italy there aren't specific industry-wide agreements for this sector. Nevertheless, it is possible to affirm that the most important organizations for this cross-cutting sector are those which gathers workers and firms in trade, tourism and services sector. As for employers organisations, for example, *Confcommercio* and *Confesercenti*, the two most important organisation for trade, tourism and other services, have internal federations which represent firms in the Horeca sector but also in other services (such as, for example travel agency, etc.). *Confcommercio* has its sectoral federation (*Confiturismo*), which gathers many different specific organisation such as *Federalberghi* (hotels), *Fipe* (Bars and catering), *Flavet* (tours operators), *Faita* (campings), *Rescasa* (residence and lodging houses). *Confesercenti* has a similar organization, with *Assoturismo* (tourism), that gathers together many specific organisations, of which some of the most important are *Asshotel* (hotels), *Fiepet* (Bars and catering), *Fiba*, *Assoviaggi* (tours operators), *Assocamping* (campings).

Management organisations negotiating collective agreements

<i>Employers</i>	<i>Type of companies covered</i>	<i>Companies**</i>	<i>Employees***</i>	<i>Density</i>	<i>CB</i>	<i>National affiliation</i>	<i>European affiliation - indirect</i>
Federturismo	Tourism	NA	NA	NA	Yes	Confindustria	UNICE
Confuturismo (Federalberghi, Fipe****, Fivet, Rescasa)	Tourism	200.000	950.000	NA	Yes	Confcommercio	Eurocommerce, HOTREC, Ho.re.ca, FERCO
Assoturismo (Asshotel, Fiepet, Fibra, Assoviaggi, Assocamping)	Tourism	40.000	364.000	NA	Yes	Confesercenti	-

** These data refers to the total membership of sectoral association without trade and distribution's workers. For this reason this data account for hotel restaurant and café workers and also for workers in other services

*** These data refer to the total amount of workers represented by general organisation (Confcommercio and Confesercenti), including workers in trade and distribution

**** Fipe has a sub-sectoral association called ANGEM (Associazione Nazionale Aziende di Ristorazione Collettiva). Its membership has been quoted in the data. However Angem represents 52 firms for a total of 15,000 workers. ANGEM is directly affiliated to the European organisation FERCO.

Labour organisations negotiating collective agreements

The representation of workers' interests in Italy is mainly horizontal and not sectoral: sectoral federations are actually internal structures of general trade unions. Consequently, even if sectoral federations usually have autonomy in collective bipartite negotiation, they usually must behave according to interfederal strategies, especially in the field of social and IR policies. With regard to the territorial level, provincial intersectoral associations have a leading role at the local level in the Italian I.R. system. They are fully autonomous, both in legal and administrative terms. In the case of the Horeca sector, the most important organizations which sign collective agreements are sectoral organizations for tourism, trade and services activities. They participate directly to the process of collective bargaining and sign collective agreement.

<i>Employees</i>	<i>Types of employees covered</i>	<i>Members**</i>	<i>Density*</i>	<i>CB</i>	<i>National affiliation</i>	<i>European affiliation - indirect</i>
Filcams	All	156,000 15,000	41%	Yes	CGIL	EFFAT, UNI-Europa, ETUC
Fisascat	All	84,000 15,000	22.1%	Yes	CISL	EFFAT, UNI-Europa, ETUC
Uilutcs	All	58,400 15,000	15.4%	Yes	UIL	EFFAT, UNI-Europa, ETUC

** data from the expert refer to the total membership of sectoral association without trade and distribution's workers. For this reason this data account for hotel restaurant and bars' workers and also for workers in other services

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.10 Luxembourg

The statistics include the following activities: hotel, other provision of short-stay accommodation, restaurants, cafés - bars, canteens and catering (NACE 55). The total amount of employment in this sector is about 12.414 people. Among these, 9987 are dependent workers.

Companies	Employees	Coverage
2.406	9.987	0.5%

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation – indirect
Horesca asbl	All	NA	NA	NA	Yes**	CCM-UEL ²⁶	-

** Horesca intervenes in the negotiation of collective agreements only when it would be a question of declaring a convention of general obligation. Basic conventions are thus left with the care of the only trade-union actors.

In facts, there exists in Luxembourg only one agreement in force in the sector. It relates to a restaurant called the "Arche " and covering about fifty people. This agreement takes effect of January 1 2000 to December 31 2001. Only the OGB-L is signatory of this convention.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation – indirect
Syndicat alimentation et hôtellerie OGB-L	All	1.400	14%	Yes	CGT-L	EFFAT, ETUC
Lëtzebuurger Chrëschtliche Gewerkschafts-Bond - LCBG	All	100	1%	No	LCBG	EFFAT, ETUC

The trade-union *Onafhängege Gewerkschafts-Bond Lëtzebuerg* - OGB-L counts 1400 affiliates in the sector. It estimates that it represents more than 10% of workers the sector. Among those one distinguishes 5% from white collars and 95% of blue collars. This trade union takes part in the collective bargaining and the consultations with public authorities. Its representativeness is not disputed.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

²⁶ CCM-UEL : our acronym for *Confédération des Classes Moyennes, Union des Entreprises du Luxembourg*

4.1.1 Netherlands

Contextual data

The following activities are classified as part of the hotels and restaurants sector (SBI 55 / NACE 55) in the Netherlands: hotel-restaurants, guest-houses, conference locations (SBI 551), camping sites and other facilities for recreational stay (e.g. youth hostels, holiday apartments) (SBI 552), restaurants, snackbars etc. (SBI 553), cafés (SBI 554), canteens and contract-catering (SBI 555).

The total number of companies is about 45,706 (Bedrijfschap Horeca en Catering 2000). Collective bargaining takes place in three subsectors: *catering* employs 285,400 people (Bedrijfschap, Annual Report 1999), *lodging* employs 19,000 people (RECRON, interview) and *contract-catering* employs 16,500 employees

Companies	Employees	Coverage
45,706	321,000	NA

Collective bargaining are divided in three sub-sectors:

- Since 1998, there are two 'competing' employer's associations in the "Catering" sector. The oldest and largest association is Royal Catering Netherlands (*Koninklijke Horeca Nederland*, KHN). KHN concludes a collective agreement for catering with the 'established' labour unions FNV Horeca and CNV Bedrijvenbond. This agreement is usually generally extended. The second employers' association for catering, Dutch Catering Guild (*Nederlands Horeca Gilde*, NHG) has been established as an alternative to KHN. NHG concludes a legally valid collective wage agreement with the small and independent labour union LBV/OVB. The members of the NHG are therefore exempted from the generally extended KHN agreement. Collective bargaining are well controversial in this sub-sector. In particular, Each employers' organisation questions the representativeness of the other.
However, KHN has been able to provide an accountant's declaration to prove its representativeness, and the collective agreement has been generally extended. So far, only a small number of companies have become member of the challenging employers' association NHG.
- In contract-catering, the generally extended agreement is concluded by Veneca, FNV Horeca, CNV Bedrijvenbond and De Unie. These organisations also govern the sectoral council for contract-catering 'Quality of labour for the contract-catering sector' (Kwaliteit v/d arbeid voor de contractcateringbranche) that advises the government on social security matters. In contract-catering participation in collective negotiations is not controversial; social partners recognise each other's position, there are no alternative organisations.

- In lodging the generally extended agreement is concluded by RECRON, FNV Horeca and CNV Bedrijvenbond. There is no sectoral council for lodging, nor is there institutionalised consultation with the government. Bargaining parties recognise each other, there is no alternative representativeness. Member companies of Veneca and RECRON employ over 90 percent of people working in their respective sub-sectors

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Koninklijke Horeca Nederland – KHN	Catering companies	18.000	185.000	57% (65%**)	Yes	VNO-NCW	HOTREC, UNICE
Nederlands Horeca Gilde – NHG	Catering companies	350	8.000	2.5%	Yes*	MKB-Nederland	UEAPME, Eurocommerce
Vereeniging van Recreatieondernemers Nederland – RECRON	Lodging and oneday recreational companies	1.400	18.000	5,6% (>90%**)	Yes	-	EFFCO
Vereeniging Nederlandse Cateringorganisaties – VENECA	Large contract – catering companies	12	15.840	5% (>90%**)	Yes	VNO-CNW	FERCO, ECA, UNICE

** Density rate is the number of employees members of an organisation divided by the potential members in respective subsector/occupations, estimated by the national expert.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirect
FNVHorecabond	All	28.000	8,7%	Yes	FNV	EFFAT, ETUC
CNV Bedrijvenbond	All	2.750	0,85%	Yes	CNV	EFFAT, ETUC
De Unie	Contract catering workers	221	0,06%	Yes	Unie MHP	EFFAT, UNI
LBV-OVB	Catering workers	1.950	0,6%	Yes	-	-

Despite low union density in the sector as a whole, the labour unions FNV Horeca and CNV Bedrijvenbond are recognised by the employers' associations in the sector as legitimate and representative organisations. These labour unions negotiate all collective agreements in the catering sector, apart from the agreement between NHG and LBV/OVB, and are represented in all governing organisations, social funds and advisory councils, where they exist.

Even if LBV-OVB and NHG conclude a legally valid alternative agreement, these organisations do not participate in any other, agreement or social funds. Thus LBV/OVB only represents a small number of employees in catering and the figures presented by this organisation may not be very reliable.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.12 Portugal

Contextual data

Of which % <10 employees	Employees	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
21.886	142.504	69.618	27.637	100%

Data are for hotel trade and restaurants, October 1997.

About 5% of the working population are employed in the Horeca sector. This sector is characterised by a high proportion of seasonal workers.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
União das Associações de Hotelaria e Restauração do Norte de Portugal – UNIHRRNOR	Hotels, restaurants, cafés	7.500	NA	NA	Yes	CIP	HOTREC, UNICE
Associação dos Hóteis e Empreendimentos Turísticos do Algarve – AHETA	Hotels, tourist companies	270	NA	NA	Yes	Confederação do Turismo Português	-
Federação da Indústria Hoteleira e do Alojamento Turístico de Portugal - FIHOTEL	Hotel industry	NA	NA	NA	Yes**	-	HOTREC
Federação da Indústria Hoteleira e Similares de Portugal	Hotel industry	NA	NA	NA	NA	-	FERCO via ARES***

**FIHOTEL do not take part directly in collective bargaining but has 7 regional member organisations that participate to collective agreements. These are AIHSA (Associação dos Industriais de Hotelaria e Similares do Algarve), AHP (Associação dos Hoteis de Portugal), AIHP (Associação dos Industriais de Hospedagem de Portugal), ARHCESM (Associação Regional de Hoteis da Costa do Estoril, de Sintra e Mafra), AHRC (Associação de Hoteis da Região Centro), AHRN (Associação de Hoteis da Região Norte) and the Associação de Pensões do Norte.

*** The following organisation, Associação dos Restauração e Similares de Portugal – ARES, belong to the Federação da Indústria Hoteleira e Similares de Portugal and is directly affiliated to the European Organisation FERCO.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density	CB	National affiliation	European affiliation - indirect
Sindicato dos Trabalhadores de Escritório, Comércio, Hotelaria e Serviços – SITESE	All	27.872 (4.443 in hotel business) 1000	3%	Yes	UGT, FETESE	EFFAT, ETUC
Federação dos Sindicatos de Alimentação, Bebidas, Hotelaria e Turismo de Portugal – FESAHT	All	40.000	28%	Yes	CGTP-IN	EFFAT, ETUC

Collective agreements are concluded at sectoral, regional and company level. There are about 15 collective agreements in the sector.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.13 Spain

Contextual data

The hotels and restaurants sector (HORECA) is usually identified in Spain with all the activities corresponding to NACE 55. It includes the subsectors of hotels, camping sites, restaurants, drinks and beverages establishments and collective dining places.

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employees (% full employment)	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
261.316	49.3%	96% (46.7% of companies with employees)	0.2%	570.400 +100.000 during high season	67%	+/- 55%	+/- 15%	+/- 95%

The hotels and restaurants sector in Spain is a highly fragmented one. The number of medium-sized and large companies is very small. There is a total number of 261.316 companies in the sector. Out of them 187.011 are establishments for drinks (bars, coffee-shops and similar). The hotel companies are 10.772, the camping and similar 5.100, restaurant companies 50.400 and collective dining places 8.033. Up to 49.3% of the companies in the sector have no employees. Another 46.7% of the companies have less than ten employees in staff, whereas 3.8% have between ten and hundred. Only 0.2% have more than hundred workers.²⁷

At the beginning of 2001, the hotels and restaurants sector employed 853.300 people, almost reaching one million in the high season. With regard to employees, they are 570.400 at the beginning of the year and 100,000 more in summer. Thus, approximately 67% of the employment are made up by employees. According to the company structure in the sector, only 54,900 employees are employed in workplaces from 20 to 49 workers, and 89,100 in workplaces with 50 or more employees.²⁸

External contracting by means of temporary employment agencies is important.²⁹ However, the previous numbers on employment may have a mistake since informal ways of employment or employment without contract are not reflected and they usually take place in some fields of the sector.

²⁷ data from the *Instituto Nacional de Estadística*, National Institute for Statistics (INE, *DIRCE* 2000)

²⁸ data from the '*Encuesta de Población Activa*', Active Population Survey, by the INE

²⁹ according to the '*Encuesta de Coyuntura Laboral*', Labour Situation Survey, by the INE,

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Federación Española de Hostelería – FEHR	All	160.000	480.000**	NA	Yes	CEOE, CEPYME	UNICE, UEAPME, FERCO via FEADRS
Federación Española de Hoteles - FEH	Hotels	8.000	100.000**	NA	Yes	CEOE	HOTREC, UNICE
Agrupación Hotelera de las Zonas Turísticas de España - ZONTUR	Hotels	3.000	100.000**	NA	Yes	CEOE	HOTREC, UNICE
Federación Española de Asociaciones dedicadas a la Restauración Social ³⁰ - FEADRS	Social restoration	NA	45.000	6,7-7,8%	No	FEHR, CEOE, CEPYME	FERCO, UNICE, UEAPME

**These figures include employees, self-employed professionals, firm owners and family members.

Labour organisations negotiating collective agreements

Employers	Types of employees covered	Members	Density*(1)	CB	National affiliation	European affiliation - indirect
Federación Estatal de Trabajadores y Empleados de Servicios de la Unión General de Trabajadores - FETESE-UGT	All	12.000	1,8-2%	Yes	UGT	EFFAT, UNIEuropa, ETUC
Federación Estatal de Comercio, Hostelería y Turismo de Comisiones Obreras - FECOHT-CCOO	All	41.000 10.000	6,1-7,2%	Yes	CCOO	EFFAT, UNIEuropa, ETUC
Federación de Empleados, Técnicos y Alimentación de Solidaridad de Trabajadores Vascos - FETA-ELA	Basque employees	2.000	0,3-0,35%	Yes	ELA	EFFAT, ETUC

(1) The variation is due to the taking into account or not of seasonal workers in the denominator

³⁰ The *Federación Española de Asociaciones dedicadas a la Restauración Social* - FEADRS is affiliated to the FEHR. This sub-sectoral organisation does not take part on industrial relations and on collective agreements. They only take part indirectly, by the FEHR. FEADRS is affiliated to FEHR and directly to FERCO.

There is a unique national framework agreement, the '*Acuerdo Laboral de ámbito estatal para el sector de Hostelería*', Labour Agreement of state scope for the Hotels and Restaurants Sector; and about 50 collective agreements, each of them belonging to a province and, in some cases, to an autonomous community. Besides the agreements above, the Ministry of Labour has about 95 company collective agreements recorded which globally employ around 17,000 workers. The signatory organisations are mentioned in tables.

The same managers' and union organisations and organisations included in them are the ones which mainly take part in the bargaining of collective agreements of lower territorial levels in the sector.

According to the records from the Ministry of Labour, collective agreements in the sector practically cover practically all employees in the sector due to its '*erga omnes*' applicability.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.14 Sweden

Contextual data

From a statistical point of view, the hotels and restaurants sector in Sweden refers to the activities usually identified as corresponding to NACE 55. It includes the subsectors of hotels, short-stay accommodation (like camping sites), restaurants, drinks and beverages establishments, collective dining places and catering.

In 2000, the sector of the HRC counted 21.126 companies. Approximately 55% of the companies did not have employees (11.542 companies). The distribution by size of the companies in the sector contrasts with that of the whole of the economy, in particular concerning the share of companies without employees, which is appreciably weaker within the HRC (55% against 74% for the whole of the economy). Small companies (less than 50 employees) dominate the sector (approximately 99 % of the companies of the sector). These companies account for approximately 60% of paid employment. Large companies (more than 100 employees), employ nearly of 30 % of the total number of employees in the sector. The sector of the HRC represented in 2000 approximately 2,1 % of the working population occupied in Sweden (approximately 87 500 employees, is 2,3 % of total paid employment). During the last decade, employment knew a sustained high growth. On the whole of the period (1993-2000) employment increased approximately 23%. Approximately 70% of employees have an unspecified duration contract (fixed employment).

Companies	Of which % without employees	Of which % <10 employees	Of which % >100 employees	Employees	Employees (% full employment)	Employment in companies <10 employees	Employment in companies >100 employees	Coverage
21.126	55%	92%	0.3%	87.453	+/- 80%	27.8%	29.9%	75%

An employers' organisation and 2 trade-union federations are signatories of collective agreements in the HRC sector. The level of negotiation is the sector but also the company. There are 2 collective agreements. For blue-collar workers, there is a collective agreement covering restoration, hotel trade, maintenance and cleaning employees. For white collars workers, there is a collective agreement covering the employees of hotel and the restoration like the heads of kitchen, the Masters of hotels, average and higher administration executives.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
Sveriges Hotell- och Restaurangföretagare – SHR	Hotels, restaurants, cafes	4.150	41.000	47% (35% ^{**})	Yes	Svenskt Näringsliv ^{***}	HOTREC, UNICE
^{***} Formerly Svenska Arbetsgivareföreningen - SAF							

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members	Density*	CB	National affiliation	European affiliation - indirect
Hotell- och Restauranganställdas Förbund - HRF	Blue collars	61.000	70% (80% ^{**})	Yes	LO	EFFAT, ETUC
Tjänstemannaförbundet - HTF	White collars	6.420	7.3% (65% ^{**})	Yes	TCO	EFFAT, Eurocadres, ETUC

*Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector

** Density rate is the number of members divided by the potential members in respective subsectors/occupations, estimated by the national expert. Let us stress that the national expert disagree with our way of calculating density.

Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

4.15 United Kingdom

Contextual data

There were 301.377 employees' jobs in hotels and 481.522 in restaurants in 1999. Bar employees (429.000) and self employed licenses were about 510.000 people. According to Eurostat data, in 1998, there were 1.068.000 employees in the entire sector.

Employees	Coverage
1.068.000 (910.522*)	-

*Employees in hotels, restaurants and bars.

Collective bargaining takes place at the company level in the hotels, restaurants and catering sector between companies and trade union representatives.

Management organisations negotiating collective agreements

Employers	Type of companies covered	Companies	Employees	Density*	CB	National affiliation	European affiliation - indirect
British Hospitality Association – BHA**	Hotels, restaurants and catering industry	30.000	425.000	40%	No	CBI	HOTREC, FERCO, UNICE

**Trade association

The British Hospitality Association (BHA) is the national trade association of hotel restaurant, catering and leisure companies in the United Kingdom. The BHA is a trade association. It is not directly involved in the regulation of pay and conditions of employment via bargaining with trade unions. It represents some 30.000 establishments, with 325.000 bedrooms employing over 425.000 staff. Membership is throughout the country, with all the major hotel companies operating in the UK and motorway service operators.

Labour organisations negotiating collective agreements

Employees	Types of employees covered	Members ³¹	Density	CB	National affiliation	European affiliation - indirect
GMB	All	8.100 <i>3.000</i>	0.8%	Yes	TUC	EFFAT, ETUC
Transport and General Workers Union - TGWU	All	10.000 <i>3.000</i>	0.94%	Yes	TUC	EFFAT, ETUC
Union of Shop, Distributive and Allied Workers - USDAW	All but predominantly in the café/restaurant sector	1.200 <i>1.000</i>	0.1%	Yes	TUC	EFFAT, ETUC

There are three main unions in the sector: the GMB, the TGWU and the USDAW. They conclude several collective agreements with companies in the different sub-sectors. GMB and TGWU are both general unions and would be likely to recruit the same category of worker. The USDAW is the main trade for workers in the retail trades. While union density remains low in this sector, unions are recognised by some leading employers and thus negotiate with these employers.

* Density is the ratio between affiliates or employees members of an organisation and the total number of employees in the sector
Bold = data from the national expert, Bold Italic = data from the European organisation, Italic = our estimates

³¹ According to USDAW, membership figures can be underestimated by excluding members working in cafes/restaurants within department of chain store or in supermarket.

5. Appendix

5.1 Acronyms mentioned in this report

Acronym	Country	Organisation
AICC	EI	Association of the Irish Contracts Caterers
ANGEM	IT	Associazione Nazionale Aziende di Ristorazione Colletiva
ARESP	PT	Associação de Restauração e Similares de Portugal
BDA	DE	Bundesvereinigung der Deutschen Arbeitgeberverbände
BHA	UK	British Hospitality Association
CBI	UK	Confederation of British Industry
CCAS	BE	Centrale Chrétienne de l'Alimentation et des Services
CC.OO	SP	Comisiones Obreras
CEC	EU	Confédération Européenne des Cadres
CEOE	SP	Confederación Española de Organizaciones Empresariales
CEPYME	SP	Confederación Española de la Pequeña y Mediana Empresa
CES	EU	Confédération Européenne des Syndicats
CESI	EU	Confédération Européenne des Syndicats Indépendants
CFDT	FR	Confédération Française Démocratique du Travail
CFTC	FR	Confédération Française des Travailleurs Chrétiens
CGC	FR	Confédération Générale des Cadres
CGIL	IT	Confederazione Generale Italiana del Lavoro
CGSLB	BE	Confédération Générale des Syndicats Libéraux de Belgique
CGT	FR	Confédération Générale du Travail
CGT-L	L	Confédération Générale du Travail Luxembourgeoise
CGTP-IN	PO	Confédération Générale des Travailleurs Portugais
CISL	IT	Confederazione Italiana Sindacati Lavoratori
CNE	BE	Centrale Nationale des Employés
CNV	NL	Christelijk Nationaal Vakverbond
CONFCOMMERCIO	IT	Confederazione Generale del Commercio del Turismo e dei Servizi
CONFESERCENTI	IT	Confederazione Italiana Esercenti Attività Commerciali, Turistiche e dei Servizi
CONFINDUSTRIA	IT	Confederazione Generale dell'Industria Italiana
CPIH	FR	Confédération des Professionnels de l'Hôtellerie
CSC	BE	Confédération des Syndicats Chrétiens
DA	DK	Dansk Arbejdsgiverforening
DEHOGA	DE	Deutsche Hotel- und Gaststättenverband
DGB	DE	Deutscher Gewerkschaftsbund
EFCO	EU	European Federation of Campingsite Organisations
EFFAT	EU	European Federation of Food, Agriculture and Tourism workers
ELA	SP	Euzko Langilleen Alkartasuna / Solidaridad de Trabajadores Vascos – ELA/STV
EMRA	EU	European Modern Restaurants Association
ETUC	EU	European Trade Union Confederation
FdS	FR	Fédération des Services - CFDT
FEADRS	SP	Federación Española de Asociaciones dedicadas a la Restauración Social
FECOHT-CCOO	SP	Federación Estatal de Comercio, Hostelería y Turismo de Comisiones Obreras
FEH	SP	Federación Española de Hoteles
FEHR	SP	Federación Española de Hostelería
FEDERALBERGHI	IT	Federazione delle Associazioni Italiane Alberghi e Turismo
FERCO	EU	Federation Européenne de la Restauration Collective
FERECA	PT	Federação da Restauração, Café e Similares de Portugal

FESHAT	PO	Federação dos Sindicatos de Alimentação, Bebidas, Hotelaria e Turismo de Portugal
FETA-ELA	SP	Federación de empleados, Técnicos y Alimentación de Solidaridad de Trabajadores Vascos
FETESE-UGT	SP	Federación Estatal de Trabajadores y Empleados de Servicios de la Unión General de Trabajadores
FGTA	FR	Fédération générale des travailleurs de l'alimentation et service – FO
FGTB	BE	Fédération Générale du Travail de Belgique
FHR	FI	Majoitus- ja ravitsemusalan työnantajat (Finnish Hotel and Restaurant Association)
FIHOTEL	PT	Federação da Indústria Hoteleira e do Alojamento Turístico de Portugal
FIHSP	PT	Federação da Indústria Hoteleira e Similares de Portugal
FIPE	IT	Federazione Italiana Pubblici Esercizi
FNIH	FR	Fédération Nationale de l'Industrie Hôtelière
FNV	NL	Federatie Nederlandse Vakbeweging
FO	FR	Force Ouvrière
FVG	AU	Fachverband Gastronomie
FVH	AU	Fachverband Hotellerie
GHGPD	AU	Gewerkschaft Hotel, Gastgewerbe und Persönlicher Dienst
GPA	AU	Gewerkschaft des Privatangestellten
GSEE	GR	Confédération Générale des Travailleurs Grecs
HORESTA	DK	Hotel- Restaurant- og Turisterhvervets Arbejdsgiverforening
HOTREC	EU	Confederation of National Associations of Hotels, Restaurants and Cafés and Similar Establishment in the European Union and European Economic Area.
HRF	SW	Hotell- och Restauranganställdas Förbund
HTF	SW	Tjänstemannaförbundet
IBEC	IE	Irish Business and Employers Confederation
ICTU	IE	The Irish Congress of Trade Union
IHA-D	DE	Hotelverband Deutschland
IHF	EI	Irish Hotel Federation
ISME	EI	Irish Small and Medium Enterprises
KHN	NL	Koninklijke Horeca Nederland
LCBG	L	Confédération des Syndicats Chrétiens du Luxembourg
LO	DK	Landsorganisationen I Danmark
LO	SW	Landsorganisation en i Sverige
MEDEF	FR	Mouvement des Entreprises de France
MHP	NL	Vakcentrale voor Middelbaar en Hoger Personeel
MKB	NL	Midden en Klein Bedrijf
NGC	DE	Gewerkschaft Nahrung-Genuss-Gaststätten
NHG	NL	Nederlands Horeca Gilde
ÖGB	AU	Österreichischer Gewerkschaftsbund (Austrian Trade Union Federation)
OGB-L	L	Confédération syndicale indépendante - Luxembourg
PAM	FI	Palvelualojen Ammattiliitto
POEE-YTE	GR	Panellinia Omospondia Ergaton Epitismou Kai Ypallilon Touristikou Epagelmaton
POX	GR	Panhellenic Federation of Hoteliers
PT	FI	Palvelutyönantajat
RAI	EI	Restaurant Association of Ireland
RBF	DK	RestaurationsBranchens Forbund
RECRON	NL	Vereniging van Recreatieondernemers Nederland
SAK	FI	Suomen Ammattiliittojen Keskusjärjestö
SFA	EI	Small Firms Association
SHR	SW	Sveriges Hotell- och Restaurangföretagare
SIPTU	IE	Services Industrial Professional Technical Union
SITSE	PO	Sindicato dos Trabalhadores de Escritório, Comércio, Hotelaria e Serviços
SNRC	FR	Syndicat National de la Restauration Collective
SYNARHES	FR	Syndicat National de la Restauration, de l'Hôtellerie et des Sports
TCO	SW	Tjänstemännens Centralorganisation

TGWU	UK	Transport and General Worker Union
TT	FI	Teollisuuden ja Työntekijöiden
TUC	UK	Trade Union Congress
UBC	BE	Union Belge du Catering
UEAPME	EU	Union Européenne de l'Artisanat et des Petites et Moyennes Entreprises
UGT	PO	União Geral de Trabalhadores
UGT	SP	Unión General de Trabajadores
UIL	IT	Unione Italiana Lavoratori
UMIH	FR	Union des Métiers de l'Industrie de l'Hôtellerie
UNALP	FR	Union Nationale des Professions Libérales
UNICE	EU	Union des confédérations de l'industrie et des employeurs d'Europe
UNIHR	FR	Union Nationale des Indépendants de l'Hôtellerie et de la Restauration
USDAW	UK	Union of Shop, Distributive and Allied Workers
VENECA	NL	Vereniging Nederlandse Cateringorganisaties
VIC	DE	Verband der Internationalen Caterer in Deutschland
VNO-NCW	NL	Vereniging Nederlandse Ondernemingen- Nederlands Christelijk Werkgeversverbond
WKÖ	AU	Wirtschaftskammer Österreich
ZONTUR	SP	Agrupación Hotelera de las Zonas Turísticas de España

5.2 Economic classification by activity NACE 4 / 55

H. HOTELS AND RESTAURANTS

55 Hotels and restaurants

55.1 Hotels

55.11 - Hotels and motels, with restaurant

55.12 - Hotels and motels, without restaurant

55.2 Camping sites and other provision of short-stay accommodation

55.21 - Youth hostels and mountain refuges

55.22 - Camping sites, including caravan sites

55.23 - Other provision of lodgings n.e.c.

553 Restaurants

5530 - Restaurants

554 Bars

5540 - Bars

555 Canteens and catering

5551 - Canteens

5552 - Catering