

Joint HOTREC-EFFAT survey on digitalisation and refugees

Overview of replies - Update November 2019

As a follow up to the plenary meeting of the Sectoral Social Dialogue Committee HORECA on 30 November 2018, HOTREC and EFFAT collected information from their members about activities developed at national level on the two following issues:

- New technologies, automation, robotisation and digitalisation in the hospitality sector
- Integration of refugees in the hospitality sector

Please note that replies provided in other languages than English were translated with the support of Internet-based translation facilities.

1. Digitalisation and its impact on employment and workers

Please provide information on new technologies, automation, robotisation and digitalisation in the hospitality sector in your country and their impact on employment and workers and give examples of activities undertaken at national level to shape the change.

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| <p>HOTREC</p> | <p>HOTELCAREER is a specialized job board for the hospitality industry, itself belonging to YOURCAREERGROUP and founded in 1999.</p> <p>Mission: enable people to find the job they love while providing organizations with the right service-minded people.</p> <p>It counts with 22 000 jobs which are advertised in 5 countries: Germany, Austria, Switzerland, France and Poland.</p> <p>The job board is well-known among candidates from the hospitality industry: over 52 000 applicants browse HotelCareer’s boards daily.</p> <p>With the acquisition of the specialized job board Turijobs, operating in Spain and Portugal, YOURCAREERGROUP expanded its European market. More information: https://www.hotelcareer.com/</p> |
| <p>AUSTRIA</p> | |
| <p>APHA</p> | <p>In Austria it is being considered to include digitalisation content in job descriptions (where it makes sense).</p> <p>Furthermore, there is a program called “KMU-Digital”/SMEs-digital, designed to support Austrian small and medium-sized enterprises in the field of digitalisation. The budget of KMU DIGITAL is currently exhausted due to the high demand, but there will be a new edition in the 2nd quarter of 2019.</p> <p>https://www.wko.at/Content.Node/kampagnen/KMU-digital/index.html</p> <p>Additionally there is a growing start-up scene in Austria that has developed or is developing interesting digital tools for the hotel and restaurant industry (e.g. Gronda https://gronda.eu/).</p> |
| <p>VIDA</p> | <p>The ÖGB-Project "danube@work" (1.2017-12.2019) deals among other things with the topic "Digitalisation of the world of work - effects on central industries in Bulgaria, Romania, Serbia and Austria":</p> |

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| | <ul style="list-style-type: none"> • Workplaces / Occupations • Apprentices and skilled workers training as well as continuous training • Developments in new forms of employment (crowd working) • Use of platforms for the mediation of services etc. (increase of informal work) • Effects of digitalisation on workers: autonomy / control / monitoring • Impact of digitalisation on the role of interest groups <p>The project study is foreseen to be published mid-2019.</p> <p>New technology:</p> <ul style="list-style-type: none"> • Fast food outlets e.g. some Mc Donald's restaurants have a roster-app to simplify the rosters of employees. Workers are satisfied with it. • Software on private mobile phone instead of cash register. • Some restaurants use the private mobile phones of their employees instead of a cash register, with which they take orders, register orders and print out invoices. • Convection oven (Konvektomat): a revolution in the kitchen |
| CROATIA | |
| STUH | Compared to the other 27 EU countries, Croatia is in the 22nd place by degree of digitalisation, but it is the leader among the Western Balkans. Education reform is initiated at Croatian national level. |
| DENMARK | |
| HORESTA | <p>We are increasingly experiencing new technologies and automation regarding hotels' check in/out procedures and payment systems. While this optimises - for example - the receptionists' work procedures, we do not believe that these new technologies really affect the number of staff. Rather, it seems that the technologies are used to optimise the guest experience and to provide services in new ways.</p> <p>Beginning of February 2019, a bill was proposed to promote digital payments, by abolishing the current requirement of facilitating cash payments in for example hotels. If this bill is passed, we believe this will further the development of the above-mentioned technologies.</p> |
| FRANCE | |
| GNI (SYNHORCAT) | <p>The implementation of technologies and digital solutions in the hospitality industry in France is continuing with more and more ready-for-use solutions specifically concerning back-office tasks. Indeed, for many years, establishments have mainly considered digital issues only for the front office, to be seen by consumers (website, e-reputation, online distribution...). Hospitality exhibitions and shows are more and more focused on innovations to improve the management and the functioning of establishments:</p> <ul style="list-style-type: none"> • Storage and providers management; • Hygiene monitoring; • Tasks monitoring; • Team management; • Help for recruiting. <p>These solutions really help establishments to improve their efficiency as computing did 40 years ago. This involves little training for employees, but it is well perceived by them.</p> <p>Concerning technologies, except for early birds adopting new technologic innovations, establishments are mostly waiting for the spread to reduce the costs. That is why we do not really note implementation of robotisation in the hospitality sector in France.</p> |

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| | <p>Moreover, there is a legal issue concerning “collaborative robots” that could be used for example in the kitchen, because of security issues. On the contrary of industrial robotic, these robots are working with human people, just nearby. This is the critical point: even if they are set up to not hurt human people (they stop if they touch something), they have got one nay two hands, with tools in them. These tools could be blunt. There is a real obstacle to deploy robots in France, because there is no legal basis to let these robots working with employees and prevent potential risks.</p> <p>Automation is becoming popular in hospitality establishments, but with a big gap between kind, range and size of establishments. Of course, big luxurious hotels are more innovative than a little café.</p> |
| <p>CFDT Services</p> | <p>Several points on the digital subject:</p> <p>1) <u>“Uberisation” of the sector</u></p> <p>For years, hotel and restaurant professionals have believed that their business model was unshakeable: we will always need hotels to provide an accommodation service, we will always need restaurants, because cooking is a professional business and the customer is obliged to go to the place where the service is produced. For a few years now, this whole system has been in turmoil, the arrival of digital technology is no longer to be considered as an exotic phenomenon. After the hotel business, it is now the turn of the restaurant industry to be affected by uberisation: Super Marmite, Foodora, Ubereats, Mycuistot, Deliveroo, Vizeat... these new players are flooding the restaurant market. For the recipe to take shape, it is enough to have strong entrepreneurs combined with digital technology, consumers wishing to live another consumer experience and we obtain platforms or other models affecting individuals among themselves (C to C). This new model hits all our habits and all traditional catering methods. From now on, the customer is looking for a qualitative and cheaper product, he no longer wants sometimes unkind waiters, too long service times and often disappointing dishes. This same customer has the digital reflex using it daily for all types of consumption.</p> <p>Professionals in the sector are crying out against unfair competition, some of whom are asking the public authorities to put an end to this new system. We must face the facts, the transformation of the sector with the arrival of the digital technology is under way and nothing can stop it. Although protectionism is in vogue, there will be no avoiding uberisation in the HCR sector: supply and demand are there. It is indeed a new business model that is taking shape, from production to service and sales methods using digital technology. Of course, as a union, we are also being pushed by this new subject, which is invited to meetings between company activists. The Federation of Services will take its rightful place in the debates and wishes to be an actor in what we consider to be the most important issue: the modes of regulation. The episode of the recent demonstration of VTC drivers against UBER is a perfect illustration of this. According to the Observatory of Uberisation, 50% of the hotels is uberised and 30% of the restaurants.</p> <p>Another upheaval is taking shape, namely the offer of a restaurant within a hypermarket. This, in some places, such as shopping malls, can be economically devastating. The Federation of Services is also following this subject very closely in conjunction with the CFDT Commerce teams.</p> <p>Resistance to change could be a tempting posture for a trade union organisation and one that would also resonate with a certain public. Our objective remains constant: to ensure a decent income for all workers not necessarily linked to a traditional employment contract, as well as the guarantee of social protection.</p> <p>We face a union challenge in the coming years, forcing us to rethink our union</p> |

practices and demands. The little phrase "let's reinvent tomorrow's trade unionism" often used in recent years, finds its full meaning today.

2) In the social and family tourism sector

Platformisation, online booking: online booking platforms have become essential, and force structures to lower their margins, lower prices. In a second step, it also led to the severing of stays (division over a few days, and no longer over entire weeks). This makes economic health and work organization in villages more difficult (housekeeping services, recruitment, more complicated economies of scale).

Village management: applications have been integrated into village management, managers can control the occupancy rate, the needs, and be more mobile via their phones. But it also has an effect on the workload and disconnection.

Digital tools would benefit from more testing and approval by workers' representation bodies and professionals rather than unilateral management choices. Many errors were made despite alerts (especially at VVF, also at Vacances Bleus) because the management had chosen tools unsuited to the functioning of the villages.

3) The short contract file (Contrat à durée déterminée d'usage - CDDU / Extras)

In the Hotels, Cafés and Restaurants sector, the majority employer organisation in the sector wishes to create a mobility contract for an indefinite period while paying an additional contribution in order to avoid the bonus-malus on fixed-term contracts (CDD). First of all, it is important to note that the Federation has taken note of this information through the press. The social partners have therefore not been consulted on this project since the first discussion within the sector on the issue of short contracts will take place at the beginning of March. This system, which is located between the temporary permanent contract and the employers' groups, would consist in having the employment contract carried by a platform approved by the branch grouping together the different tasks of an employee for different employers while fixing a maximum duration of recourse for the same employer. This system provides for a double contribution for companies: a contribution to unemployment insurance at the standard rate of 4.05%, to which would be added a so-called security contribution to a euro account that the worker would have freely at his disposal when he is on intermission.

This hasty announcement leaves the Federation in doubt about UMIH's intention, since it is this employers' organization. For us, what we need to fight is the abusive use of the short contract by some employers. It should be noted that the collective agreement provides for the use of the usual fixed-term contract (known as the extra contract). In 1997, the social partners had put in place a safeguard, so an extra who is entrusted by the same institution with more than 60 days in a calendar quarter may request reclassification as a permanent contract. Of course, over time, some employers manage to get around this rule. For this, the Federation is clear: the punitive sanction must be imposed with a malus! But short contracts in HCR are not only that, there are also companies in the sector whose activity is highly fluctuating (activity linked to events, catering activities, seminar and banquet activities, etc.) and who have no other choice but to use these short contracts. It is important for the Federation to obtain additional social rights for this category of employees and measures related to the security of pathways, especially for elderly workers. It is also essential for the Federation that these employees (extras) do not leave the conventional law of the branch by letting themselves be tempted by uberisation, since platforms are beginning to develop in the HCR sector. You see, the subject is not a simple one and it would be very clumsy to have a firm position today that would be to take it all or reject it all. To be continued.

| GERMANY | |
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| IHA | Market research and benchmarking for members (for instance study “Hotellerie 4.0” by Roland Berger). Annual Start-up-Award |
| GREECE | |
| HCH | <p>There is a growing concern and engagement in the Greek hospitality sector for the digital transformation of their businesses, especially in the last two years.</p> <p>According to a survey that was conducted in 2017 for the digital state of the Greek tourism industry, there is a strong digital capital stock in tourism businesses, mostly by using ICT specialists, but there is no adequate performance in digital technologies and of course limited usage of emerging technologies. This is due to the impact of the financial crisis on the Greek state and on the SMS enterprises of the hotel sector: the state could not upgrade the national communications infrastructure, thus holding back the industry’s digitalisation and the SMS could not make significant investments in digital technologies. In the last 2 years there is notable change in the digital ecosystem.</p> <p>In an effort to bridge the new technologies gap in the tourism and hotel sector in Greece, the Hellenic Chamber of Hotels created the CapsuleT, an accelerator for travel and hospitality start-ups www.capsuletaccelerator.gr. It is one of the strong and unique tools for the hotel sector to get involved with the start-up community, enabling both parties, the start-ups and the hotels, to develop collaborations with a positive impact on the Greek hospitality sector.</p> |
| HUNGARY | |
| HHRA | <p>The Hungarian Tourism Agency (MTÜ) has a new initiative, which is called National Tourism Data Supply Centre (NTAK). It is a new digital data supply system that presents the financial and statistical data of all types of accommodation services (hotels, pensions, holiday cottages, camping sites and short-term rentals, too) in the country real time. Among others the number of adult and child guests, their nationality, the time they spent in Hungary, the services used by them and the amount spent by guests, also the tourist tax, etc.</p> <p>Among the data provided by hotels, pensions, etc. the National Directorate-General for Aliens Policing has access to the personal ones (name, date of birth, passport number, etc.). The local authorities will have access to the relevant statistics in order to verify the tourist tax payments. The National Tax and Customs Administration (NAV) will have access to the data about payments of VAT. The Hungarian Tourism Agency will have access to the number of guest nights by nationalities, their average stay, spending, etc.</p> <p>This reporting procedure reduces the administrative load on all types of accommodation and provides data for better understanding of the tourism of Hungary.</p> <p>The Hungarian Tourism Agency uses the received statistical data to prepare reports, analyses for the tourism industry. This input makes it possible to measure more effectively the marketing activities and the results of the tourism development of MTÜ, and also allows better targeted campaigns and interventions to increase interest in Hungary both within the country and abroad. With the introduction of the new system, each accommodation facility will be able to fulfil their data registration obligation required in relation to guest registration digitally, by using PMS. NTAK will receive data from the accommodation providers through a direct connection. Those data will be stored, processed, aggregated and used to prepare analyses for the actors of the sector and to the authorities specified by law. The data provided for the MTÜ is aggregated by region, by hotel category, and averaged, allowing the data providers to access to the average data</p> |

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| | online. For example, hotels can look at the average occupancy, average room rate, average RevPar of hotels in its region, by category, by weekdays, weekends, monthly, quarterly, yearly. The above reporting system is being implemented in several steps between 1 July 2019 and 30 June 2020. |
| VISZ | I hope we will be ready for the robotisation tomorrow. |
| ITALY | |
| FIPE | <p>The digitization has played an important role in Italy in recent years. The digitalisation of the hospitality sector, especially for restaurants, has created the need to develop new employees' skills. In restaurant sector the most important digitalization tools developed are:</p> <ul style="list-style-type: none"> • Food delivery platforms • Web marketing • Online restaurant booking • Online restaurant reviews |
| LATVIA | |
| LAKRS | <p>In the last years have appeared a lot of different technologies in restaurants to make the work of the waiters easier / better. For example: smart devices (tablets, telephones) for receiving orders, for storing important information for guests at the time of booking (diets, allergies, birthdays, favourite table, etc.).</p> <p>Has been created many applications to receive an information about the dishes and wine, for example wine bottle's barcode which scanning you can find out everything about the producer, grapes, the harvest year, etc. Cash settlement, order processing systems are with updates. Facebook groups have been set up where you can quickly contact all "free/available" waiters to complete the work group for banquets. Step counting applications.</p> <p>Scanners to read an information from customer's cards, gift cards, discount vouchers, etc. Contactless credit / debit cards improve working time during billing. 'Corovin' - equipment for selling exclusive wines in glasses without damaging the remaining wine in the bottle. As well, nurseries (rooms) with video surveillance allow parents to watch their children during the dinner on special tablets in the restaurants.</p> <p>Not all new technologies are comfortable for waiters, such as smartphones for ordering. Work with the client is variable and the wishes of the customers can change rapidly, so accepting the order can be done more quickly by writing it on the paper. If necessary, delete the unnecessary order and you don't need to look for the deletion option in the system and replace with the other food instead. To organize customers' order correctly and sequentially waitress needs to take a moment to think about it because it can be affected by various factors - the cook's ability to read and understand the order, the availability of the products, the additional wishes of the guests (extra ingredients, replacement of ingredients, presentation time, etc.).</p> <p>At the moment in the national level happens very serious improvement of the sectoral qualification system for the development of vocational education and quality assurance (Modular Education Program (MIP)).</p> <p>This program comes in a partnership with:</p> <ul style="list-style-type: none"> • National Centre for Education • National Development Plan of Latvia for 2014–2020 • European Union, European Social Fund |

| NORWAY | |
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| Fellesforbundet | <p>Some of the hotel chains have invested in check in machines, like the ones used at airports for checking in.</p> <p>Many of the hotels have started using smart phones and smart tablets for checking off cleaning of rooms. Its more interactive and provides information of resent vacant rooms.</p> <p>Some hotels have started using robot vacuum cleaners.</p> |
| SPAIN | |
| CCOO Servicios | <p>The analysis of the impact of digitalisation on the Spanish tourism sector is very relevant given the importance of this economic activity, both in terms of GDP and employment, as well as its favourable impact on the external balance. In this regard, the tourism industry has been a key driver for the economic recovery in Spain since 2014, and it contributes nowadays with the 6% of the whole GDP and of 9% of total employment (2,56 million jobs)²⁹.</p> <p>It is important to note that the tourism sector comprises various branches of activities, such as the hospitality industry, passengers transport, travel agencies, tour operators and other reservation services and related activities. In this regard, there is a strong weight of the hospitality industry (accommodation and food service activities), which amounts around 64% of the employment of the tourism sector in Spain.</p> <p>Other relevant features of the sector worth remarking are:</p> <ol style="list-style-type: none"> a. the atomisation of the business structure, with a high percentage of small and micro-companies; b. the seasonality of the demand, which conditions the strategies of the firms (particularly, with regard to the management of the workforce); c. the low degree of technological innovation, especially among the smaller companies; and d. the high level of precarious work, both in terms of type of contracts and working conditions (Gabinete Económico CCOO-Servicios, 2018). <p>Against this background, the literature review shows that digitalisation is having a significant impact in the tourism industry, and therefore represents a major challenge for its sustainability in Spain. Particularly, given that this sector is strongly exposed to the competence of other tourist destinations in a highly changing environment at a global level (Consejo Económico y Social, 2017; De Pablo, 2016; Fundación Orange, 2016.a; Observatorio ADEI, 2015; Roland Berger, 2016; Romero, 2018; SEGITTUR e Instituto Tecnológico Hotelero, 2014; Valls and Roche, 2017).</p> <p>More specifically, the analysis of available statistics points to an almost universal implementation of ICT and the basic digital uses related among the firms of the sector. Nevertheless, the development of the most advances uses –for example, Big Data– are minority, and concentrated above all in the larger firms of the hotel sector (Urueña et al, 2016; Urueña et al, 2018, pp. 123-136)</p> <p>Regarding to the restructuring processes driven by digitalisation, it is worth highlighting two main trends. First, the “digitalisation of the customers” has led to the disintermediation of services, affecting to the existing operators among which travel agencies had a dominant position. The informative transparency provided by the internet, the digitalization of activities and the familiarization of the users with these technologies have caused that the companies have reframed their competitive strategies.</p> |

Second, the strong competition, the technological advances and the evolution of the user has pushed towards a new re-intermediation in which online players with a strong B2C reputation (online search engines, online agencies) are now the leaders of the industry.

In addition, there has been an emerging process of digital transformation of the existing firms, although is mainly concentrated so far in the business segment of the larger hotels. On the other hand, the main changes in the tourism sector are taking place in the production and commercialization phase of the service, while its final consumption is strongly linked to activities with intensive use of labour where the impact of digitization instill low. However, “it is true that technological developments suggest that this phase of tourism activity will also experience a digital transformation. The application of the internet of things or artificial intelligence could be extended to the improvement of the tourist experience, being able to impact the jobs of the sector, both in number and in qualification” (Consejo Económico y Social, 2017, p. 87).

Finally, it must be noted the emergence of new players in the branch of hospitality such as the digital platforms that allows the access to private shared or rented housing. This phenomenon is still at an early stage in Spain compared with other countries, although it has been increasing in recent years in the biggest cities like Madrid and Barcelona. In this regard, there is an ongoing public controversy about the necessary regulatory norms that should applied to these platforms, regarding to issues such as taxation, registration, responsibility and insurance.

Views of the actors

The Government of Spain has opted in the last years for the transformation of the Spanish tourism model to guarantee its present and future. A comprehensive strategy has been implemented that affects the tourist, the destination and the digital transformation of the sector.

The main initiative launched in this field has been the multi-annual *National and Integrated Tourism Plan 2012-2015* (“Plan Nacional Integral de Turismo”- PNIT). The Secretary of State for Tourism is responsible for its implementation, although there are multiple stakeholders involved in its execution.

The general objective of the PNIT is “to boost the competitiveness of companies and our destinations, renew the global leadership of our country for the coming decades and contribute to the generation of wealth, employment and welfare of citizens” (Gobierno de España, 2012, p.13).

To this end, the Plan goes on to define a series of specific objectives:

- 1) increase tourism activity and productivity;
- 2) create quality employment;
- 3) stimulate a single market;
- 4) improve international positioning;
- 5) improve the coherence and recognition of the ‘Spain’ brand;
- 6) encourage public-private co-responsibility;
- 7) reduce the seasonality of tourism.

The Plan includes six axes of action and a set of measures, including among them some related to ICT and innovation:

- Smart Destinations Project. The aim of this Project is to improve the positioning of Spain as a world tourism destination, seeking new mechanisms to boost innovation in the destinations through the deployment and development of ICTs in order to create differential and highly competitive services. A further aim is to set up a standardised framework that establishes

the minimum requirements to classify tourism destinations as “Smart Destinations” aligned with the trend towards Smart Cities.

- Emprendetur. It is a program to support entrepreneurs that include actions such as creating a network of cooperation to promote tourist development, enhancement of training and improving the skills of entrepreneurs, support in finding investors, among others. It also includes a funding line, called Emprendetur R+D+i. This program has 2 areas, Emprendetur R+D; and development of innovative products.
- “INNpulsas Turismo” Platform. It is an online platform created and managed by SEGITTUR for innovative businesses and entrepreneurs in the tourism sector that offers information and advice on 4 axes: (a) lines of financing projects and new business models;
 - a) existing calls of proposals at national and international level;
 - b) supporting innovative tourism entrepreneurs
 - c) supporting the internationalization of innovative tourism products

These measures are aligned with other initiatives enacted under the Digital Agenda for Spain, such as the National Plans of “Smart Cities” and “Technologies of Natural Language”.

Also, for Public authorities there is the challenge of the regulatory problems posed by digitalisation, especially with emergence of new players such as the digital platforms that allows the access to private shared or rented housing. This is an ongoing debate in Spain, being the main initiative so far in the report of the National Commission on Markets and Competition, which has been very controversial (Comisión Nacional de los Mercados y la Competencia, 2016).

Finally, it is worth noting that, according to the Spanish authorities, the digital transformation of the sector has to face some barriers, similar to those that can be found in other economic sectors:

- a) lack of awareness and resistance to change in many firms, especially the smaller ones;
- b) the need to improve the digital infrastructures, in spite of the advances registered in recent years; and
- c) the lack of digital skills (De Pablo, 2017).

The main economic activity in the tourism sector is the hospitality industry, as noted above, which comprises accommodation and restaurant services. In this regard, business associations are fully aware of the challenges posed by digitalisation, as shown with the launching in 2017 by the Spanish Federation of the Hotel Sector (FEHR, acronym in Spanish) of the “Observatory for the Digital Transformation of the Hospitality Industry”.

According to the FEHR this is a necessary instrument to foster the digital transformation of the sector, taking into account not only the ongoing trends that are already affecting the business models but also the current digital gap in the sector: among the hotels and the restoration activities on the one side; and between the biggest firms and the small ones on the other side (Hosteleríadigital.es, 2017).

Focusing the analysis in the innovation strategies implemented in the Spanish tourism sector in recent years, the outcomes of a survey among CEOs and managers allows highlighting some relevant issues (Valls and Roche, 2017):

- 17,8% of the Spanish touristic firms do not invest on innovation. Among the companies that do invest: around 28, 3% devote between 2 and 4% of the annual turnover to innovation; 24% between 1 and 2%; and 7,4% of the companies less than 1%.

- Three major focuses illuminate innovation among Spanish tourism companies: (a) the relationship with the client. Indeed, the main area of innovation in 2017 is that of co-creation, understood as involving the client in the design of the tourism product and services; (b) the networks, to establish permanent relationships with the tourist, before, during and after the trip; and (c) the structure, understood as the alignment between talent and all kinds of assets to translate into the company's interior the great challenges of turning the client into the source of all management.
- The main concern of tourism entrepreneurs is centred on innovation of products and services, rather than in technologies.

It is also possible to point out some key barriers highlighted by managers and business associations for the digital transformation of the tourism sector in Spain (Fundación Orange, 2016.a): (a) resistance to change by the less innovative companies; (b) organizational structures that are too rigid and hierarchical; (c) lack of strategic vision on the part of many managers, who understand technology as an expense instead of as an investment and believe that the existence of a direct and tangible return is necessary to dedicate resources to technological innovation; (d) lack of talent and knowledge in digital skills within organizations; (e) atomisation of the business structure, with a high number of micro-companies (especially in restoration activities); (f) difficulty accessing financing for digital innovation; (h) regulatory uncertainty in the face of new business models; and (i) lack of knowledge and very limited use of what are considered today as more advanced technologies. This is the case of cloud computing, big data or business intelligence.

With regard to the labour impact, employers focus in the demand of new professional's profiles and the necessary re-skilling of the workforce.

Finally, employers' associations are highly concerned with the emergence of the new digital platforms in the sector, which according to them is often developing in an uncontrolled and unregulated way. In this regard, there is a call upon the public authorities for a fair competitive level playing field.

The perspective of trade unions focuses in the first instance in the denounce of the structural labour precariousness of the Spanish tourism sector, shown in dimensions like:

- a) the high prevalence of atypical contracts;
- b) bad quality working conditions, especially, in terms of low wages and long working days;
- c) the increasing outsourcing of some activities and occupations (such as hotel housekeepers) to Multi-services companies, where working conditions are rather poorer;
- d) an estimated high percentage of irregular economy and undeclared work.

Regarding to the digital transformation of the sector trade unions agree with the diagnosis about that the basic ICT uses are fully extended, but that the most advanced digital innovations are being implemented so far only in the large firms of the hotel sector.

This digital gap can be explained in their view by different reasons:

- a) the low degree of investment in innovation and training, especially in the restoration sector and in the smaller firms;
- b) the strong atomisation of the business structure, with a high level of small and micro-companies;
- c) the lack of digital skills among workers, particularly the older ones, coupled with a low level of training at a company level in ICT;
- d) the structural labour precariousness of the sector, which leads to a high

level of employee turnover favouring the consolidation of a “low-road” model of business competitiveness. Notwithstanding the above, trade unions point out that digitalisation is having some labour impacts in the traditional firms of the sector:

- The progressive disappearance of some low-qualified occupations, such as telephone operators at hotels, or the employees in charge of the billing at the restaurants.
- The emergence of new professional profiles with high qualifications requirements, particularly in the larger and most internationalized companies. For example: strategic sales manager; innovation managers; and managers of networks, information and content.
- Changes in the work organisation, especially in the commercial departments of the hotels.
- Requirement for Basic digital skills for all the employees, meaning a higher pressure for the older workforce.

Trade unions also remark that the uncontrolled emergence of the new digital platforms is favouring unfair competition and social dumping, both in the hotel and restaurant sector. Likewise, they denounce the negative social impacts in terms of the rising the housing rental prices and problems in the mobility of citizens, further aggravated in the most strategic tourist destinations.

In this regard, the Spanish trade unions claim that public authorities should ensure that legislation is fully respected by and enforced upon all providers of hospitality and tourism services, so that customers are protected, and employees are treated fairly and entitled to their rights.

Social dialogue

The role of tripartite social dialogue in the face of digitalisation of the tourism sector in Spain has been, so far, irrelevant.

In November 2017, the former government created the “*Tripartite Table for the quality of employment in the Hospitality*”, composed by the Ministry of Employment and Social Security and of Energy, Tourism and Digital Agenda, and the most representative social partners of the sector.

The aim was to analyze all the issues related to the improvement of the working conditions in the sector, paying special attention to dimensions like job stability, training, regulation and working time, and health and safety at work. In order to meet this goal, there was planned the creation of different working groups, including one related to new technologies and digitalisation.

In practice this initiative was never developed, and it was in fact paralyzed with the change of government. Nevertheless, the new Minister of Industry, Commerce and Tourism has announced the will to reactivate this Table, although at the time of writing of this report (December 2018) there is no news regarding this issue,

It is worth noting that the trade union CCOO has proposed the need of a “Pact for the Tourism” between the Government and the social partners, with the goal to foster a more sustainable and “high-quality” path road for the sector. Among other issues, this trade union poses the implementation of a “Digital agenda in the tourism industry”. In this sense, according to this trade union, “the impact of the disruption of changes in the tourism industry must be compatible with a just transition and the development of fully legal, socially and environmentally sustainable and responsible economic activities” (Gabinete Económico de CCOO, 2018, p. 33).

Also, the employers’ associations Confederation (CEOE) has posed a set of

measures, with particular emphasis in the support to the digitalisation of the small and medium companies of the sector, and the transformation of Spain into a “smart destination” (CEOE, 2018).

Collective bargaining

Collective bargaining in the hospitality industry is organized around a State framework agreement and various collective agreements at regional, provincial and company level.

It can be said that digitalisation has not still entered in the bargaining agenda of the social partners. This can be explained by different reasons: (a) the low level of innovation and dissemination of the most advanced ICT innovations, which are very concentrated in a few big firms, as noted above; (b) the generalized view that the adoption of technological change is a part of the exclusive competence of the employers; (c) the lack of knowledge about the labour implications of digital innovations; and (d) digitalisation is not included in the current priorities of trade unions, which are much more concerned with the improvement of the poor working conditions and the control and regulation of extended business practices such as the generalised outsourcing of key activities and occupations (such as hotel housekeepers).

In this regard, according to the Register of the Ministry of Employment and Social Security, there is just one collective agreement of the sector in force that address the issue of technological change³².

Nevertheless, the both representatives of social partners interviewed share the need to address the topic of digitalisation in the next renewal of the State level agreement for the sector.

Sectoral statistical information

Table 1. Gross Value Added at basic prices (current prices) in Spain by branch of activity. Accommodation services (2015)

| Sector | EUR million | % over total GVA |
|---|-------------|------------------|
| Accommodation; food and beverage service activities | 64.900 | 6,6 |
| Total Gross Added Value on Basic Prices | 979.874 | 100,0 |

Source: National Accounts, National Institute of Statistics

Table 2. Employment in Spain by branch of activity. Accommodation services (2018)

| Activity | Thousands | % over total employment |
|---|-----------|-------------------------|
| I Accommodation and food service activities | 1.757,0 | 9,1 |
| 55 Accommodation | 429,0 | 2,2 |
| 56 Food and beverage service activities | 1.328,0 | 6,9 |
| Total employment | 19.344,1 | 100,0 |

Source: Labour Force Survey, National Institute of Statistics (2018, second quarter).

Table 3. Collective agreements by year of economic effects, and workers covered in Spain by branch of activity and level of bargaining. Accommodation services (2016)

| Sector (NACE) | Total | | Company level | | Above company level | |
|---|----------------|-------------------|----------------|----------------|---------------------|------------------|
| | Nº agree-ments | Nº workers | Nº agree-ments | Nº workers | Nº agree-ments | Nº workers |
| Accommodation and food service | | | | | | |
| 55 Accommodation | 62 | 446.070 | 38 | 3.044 | 24 | 443.026 |
| 56 Food and beverage service activities | 172 | 579.418 | 142 | 13.354 | 30 | 566.064 |
| TOTAL | 5.640 | 10.738.608 | 4.471 | 804.266 | 1.169 | 9.934.342 |

Source: Statistics of collective agreements, Ministry of Employment and Social Security (2016, definitive data. Collective agreements registered up to June 2018).

Good practices (provisions of collective agreements)

New technologies

The implementation of new technologies that favour the innovation of the productive system of companies will be previously reported to the representatives of the workers, for the purposes of better planning.

Likewise, workers' representatives will have to be consulted in decisions that lead to the use of equipment, materials or raw materials that may have an impact on the physical or mental health of workers.

The implantation of new technologies should not imply the reduction of the workforce. To this end, the training of personnel will be sought through workshops aimed at this purpose. In the assumption that, in spite of the adaptation courses, any worker will not adapt to the new technologies, the company will try to adapt it to another job, after consulting the personnel representatives.

SWEDEN

HRF



HRF, together with our counterparty in something called the Visitor's Research and Development Fund (BFUF), has produced a report on how we look at the future in the industry "A growing industry during times of Change" (p12-13).

Kairos Future's survey of leaders in Sweden shows that automation affects Swedish hospitality companies to a greater extent than other sectors and that about 20 % of the jobs in the sector could be automated using currently available technology. Because this transition to automation has not already occurred, there is a lack of time and a hesitation in taking on large investment costs. Automation has played the greatest role in information and booking, but the industry leaders interviewed here see the largest difference in the future being the provision of more advanced services.

Digitalisation has the same effect in the hotel and restaurant sector as in other sectors, and it reduces the need for some skills and increases the need for others. As in so many other industries, knowledge in the meeting between man and machine and how we can work side-by-side in the best way is required.

Work tasks linked to solving unexpected problems, reading and responding to

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| | <p>situations and moods, creating new menus, making beds, and planning and coordinating activities and evaluating their outcomes will most likely continue to be performed by people in 2030. One hundred % automation is very unlikely. Research points to an estimate that approximately</p> <p>one-third of the staff of a company will need to be involved in roles such as floor walkers/greeters and will be sort of problem solvers and quality reviewers who are available to deal with issues or problems when they arise.</p> <p>Work tasks that are easy to automate include hotel check-ins, online searches for information, and robots that take care of room service or respond to questions from guests in any of a number of languages.</p> <p>Few can actually imagine replacing the human contribution in the service experience with a robot. At the same time, we increasingly accept technology in our everyday lives, especially if it creates greater value in terms of efficiency and freeing up time.</p> <p>The hotel and restaurant experiences will probably take two directions: “high tech” and “high touch”. In order to push prices, offerings with a high degree of automation will be needed. However, when most of the service process is digitalised (and thus becomes duplicable), the personal touch and human touch might become increasingly valuable. Experiences where people are integrated can be priced 2–3 times higher. The demand for each respective experience will be able to be calculated according to the customer’s needs; for example, the stressed business traveller might perhaps desire an impersonal hotel or fast food meal, while the weekend traveller might appreciate more personal service. In the future, companies can compete with their service profile to an increasing extent due to the fact that it is difficult to profile oneself with function, but much easier with passion and feeling.</p> <p>The decisive factors for how quickly and comprehensively companies take on the new technology are the purchase cost and “return on investment.” Even the quality will be a decisive factor. Today robots and technical solutions can sometimes be perceived as slow and having a high margin of error, but what happens when technology improves and becomes faster? Automation can also provide benefits such as safer delivery, availability 24 hours a day, and higher productivity, but certain actors are still likely to choose to position themselves in a premium segment by paying for human services.</p> <p>Other incentives in addition to the economy will have an impact on the automation rate by 2030, primarily in public policy and society where labour market policies and regulations can affect the sector when many low-skilled workers are outside the labour market.</p> |
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2. Integration of refugees in the labour market

Please provide examples of initiatives facilitating the integration of refugees in the labour market in your country, if possible, with a focus on the hospitality sector (please describe the activity, and provide some statistical results, if available).

| AUSTRIA | |
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| APHA | <p>The AMS Austria supports integration into the labour market with various offers.</p> <p>For example, in various provinces, so-called "competence checks" are carried out in order to vocational integration". In courses lasting several weeks, competences are taught (e.g. cultural characteristics and living together in Austria), existing professional competences of the participants are recorded and information on the topic "Working in Austria" is conveyed (e.g. rights and duties of employees, the Austrian education system, recognition of foreign qualifications and diplomas, social system, housing or health). Companies can gain professional experience (through internships), individual coaching is offered. At the end there is a result report including perspective planning.</p> <p>In cooperation with various training organisations in various federal states measures to integrate them into the labour market have been implemented for recognised refugees or beneficiaries of subsidiary protection. This also includes German courses from A2 to B2 according to the Common European Framework of Reference for Languages (CEFR).</p> <p>Companies employing recognised asylum seekers or beneficiaries of subsidiary protection can also receive support (e.g. grants) from the AMS.</p> <p>http://www.ams.at/ (Integration allowance for recognised refugees)</p> <p>In Vienna, a central initial counselling service for recognized refugees and beneficiaries of subsidiary protection is set up. There the participants receive information and advice about funding offers for successful integration into the Austrian labour market.</p> <p>Prerequisites for support in the central initial counselling:</p> <ul style="list-style-type: none"> • Residence permit: "entitled to asylum" or "subsidiarity entitled to protection" • Registration with the Public Employment Service • German-skills Level A1 <p>Especially in the area of tourism a seasonal labour demand can only be partially covered.</p> <p>The winter sports regions of Western Austria (from November to April) as well as the tourist regions throughout Austria (especially in the months of May to October) are looking for specialists with practical experience (restaurant specialists, chefs) as well as experienced auxiliary staff (kitchen helpers, cleaning staff, maids and boys, waitresses). Especially in the federal states of Salzburg and Tyrol there is a high need of staff during the winter season. Since many jobs cannot be covered by persons who have free access to the labour market, asylum seekers also have opportunities for seasonal employment in the tourism sector.</p> <p>In Styria the AMS provides another program "Integration allowance for recognised refugees". The AMS provides a subsidy for wage and ancillary wage costs (€ 400 at a max per month and up to six month). Further information:</p> |

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| | <p>https://www.ams.at/docs/630 Produktblatt EB anerkannte Asyl Fluechtlige KON SUB Frauen 01 2018 freigegeben.pdf</p> <p>Another example is a program in Carinthia which is called “TourIK” (Tourism and integration in Carinthia - the project aims to prequalify refugees, irrespective of their asylum status, for lacking occupations in the Carinthian gastronomy and hotel trade and then to place them in appropriate apprenticeships.</p> <p>There is also a program from AMS supporting apprenticeship, which is particularly well suited for asylum seekers over the age of 18. If a company trains selected apprentices, they receive support from the AMS.</p> <p>https://www.ams.at/unternehmen/service-zur-personalsuche/foerderungen/foerderung-der-lehrausbildung#niederoesterreich</p> |
| CROATIA | |
| STUH | <p>In Croatia currently live 680 asylum seekers with the right to work. 2018 Croatia has granted asylum to 183 migrants and refugees. In the beginning there was a scepticism about their employment. Now it is a better situation, because employers are satisfied.</p> |
| DENMARK | |
| HORESTA | <p>In 2016, the so-called Basic Integration Education (IGU) was introduced with great success. The education is especially aimed towards refugees and reunited family members of refugees. The 2-year education consists of a combination of schooling and work within a company. The programme has especially been used to introduce refugees to work within our sector. The IGU-students will receive payment (from the employer) equivalent to the starting level of a trainee in our sector. Various economic incentives are offered to employers taking on IGU-students. For further information, please see the attached pamphlet.</p> <p>From July 2016 to January 2019 around 2,000 IGU-students has been enrolled in the programme.</p> |
| FRANCE | |
| GNI | <p>GNI tried in Summer 2018 to ask French administration to make easier access to job markets for refugees, for example facilitating and reducing delay to get regular documents to work in France. GNI did not obtain any official response, but GNI noticed that more members called to get information concerning the process to hire foreigners.</p> <p>https://www.synhorcat.com/actualites/article/le-conseil-interministeriel-pour-le-tourisme-s-est-reuni-pour-la-3eme-fois?lang=fr</p> <p>https://www.synhorcat.com/gni/article/a-propos-de-l-emploi-des-migrants-dans-les-hotels-cafes-restaurants-et?lang=fr</p> |
| CFDT Services | <p>On this point, employers' organisations have stated that they are in favour of integrating refugees into the catering sector. There have been several experiments carried out in some departments without it being very organized.</p> <p>https://www.liberation.fr/france/2018/08/21/l-hotellerie-restauration-veut-embaucher-des-exiles</p> <p>For the Federation: UMIH has stated in the press its willingness to have migrants work in vacant positions. Today, there are reportedly more than 130,000 unfilled jobs in the hotel and restaurant sector. Instead of tackling the real causes of this labour shortage (high turnover, low pay, poor working conditions, etc.), the first employers' organisation would suddenly seem to show virtue by putting forward a solution that would be rather cynical.</p> |

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| | <p>It should already be remembered that the hotel and restaurant sector is at the top of the podium for illegal work. To understand this situation, we must reflect on the question of illegal work: there are illegal workers because there is an offer of illegal work and this offer is managed and organized by the employers finding a very specific economic function. This offer aims to reduce the cost of labour, so employers are freeing themselves from the rules of the Labour Code and the collective agreement because they have no possibility of relocating their activity. In this case, the use of clandestine work is similar to "offshoring on the spot".</p> <p>Of course, these practices are not endorsed by all employers' organisations, as evidenced by the agreement signed by the social partners in... on the fight against illegal work in the HCR.</p> <p>But by making this proposal today, UMIH is trying to moralize a practice in order to pursue this logic: to socially reduce the professional sector. Moreover, it is hard to imagine this new population of employees claiming better wages and working conditions in view of their previous situation.</p> <p>The federation is not at all opposed to integrating refugees into the hotel and restaurant sector, quite the contrary, but this must be done in an organised way with partnerships with the voluntary sector in order to take into account the professional integration dimension.</p> |
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GERMANY

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| <p>IHA</p> | <p>The German Federal Government takes a holistic approach to the integration of migrants. The integration strategy comprises three integration fields:</p> <ul style="list-style-type: none"> • Language mediation, • Integration in work, education and (university) education and • Social integration. <p>Every offer of integration depends on the phase in which a migrant finds himself: some integration offers can be taken up as soon as a migrant enters the Federal Republic of Germany, others as soon as an application has been made in the asylum procedure or only after a residence permit has been recognised or granted or a toleration has been granted.</p> <p>There are currently 128 labour market programmes throughout Germany. Responsibility lies with the local job centre or employment agency. Depending on the status of the asylum procedure, different support and assistance services are possible.</p> <p>Specific initiatives in the area of hospitality do currently do not exist or are only being planned. The following projects are cross-sectoral:</p> <p>a) <u>Project "Willkommenslotsen" (Welcome Pilots)</u> Around 180 consultants support small, medium-sized and large companies nationwide in all questions concerning the integration of refugees in training, internships or employment as part of the "Welcome Pilots" project. The welcome pilots advise the local companies on the legal framework conditions and suggest suitable applicants (refugees) to interested companies. The project is initiated and financially supported by the Federal Ministry of Economics and Technology.</p> <p>b) <u>"Unternehmen integrieren Flüchtlinge" (enterprises integrate refugees)</u> The project is promoted with 2.8 million euro by the Federal Ministry of economics and shall support enterprises in the ranges internships, apprenticeships and employment. A platform brings the companies together and organises the exchange between them. The project offers information on legal issues, integration initiatives and voluntary commitment. The project also</p> |
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| | <p>gives practical tips for the integration of refugees in training and employment and facilitates the exchange of experience and cooperation between companies. Nationwide there are offered events with which enterprises can exchange their practice examples and knowledge.</p> <p>c. <u>Project "Jobintegration Now - JOIN"</u> Supported by the Federal Ministry of the Interior, "Join" is an internship platform for refugees that enables them to enter the German labour market through an internship. Participation depends on residence status and country of origin. The internship lasts a maximum of 3 months. Afterwards the refugee receives a certificate, which is to facilitate the entrance into the German job market.</p> |
| GREECE | |
| HCH | <p>The National Employment Agency (OAED) has managed a pilot project titled "Innovative response for Facilitating Young Refugees Social Support" in the context of the Erasmus project of the EU.</p> <p>The Special Office for Coordination and Management of the Asylum, Migration and Integration Fund and the Internal Security Fund which is under the supervision of the Ministry of Development has announced in October 2019 the implementation of a pilot program for the training of migrants and refugees in professional skills.</p> <p>There are also initiatives at local level for the training of refugees which are managed by the Regional and Local Authorities.</p> |
| HUNGARY | |
| VISZ | <p>There is no migration in Hungary in West European sense. The south border is closed since 2015 November, so just a few Africans or Muslims appear on the labour market. But we have many thousands of legal migrants from Ukraine, Romania and Serbia. They are coming in the hope of a better life, education for their children and working conditions including higher salary. The majority Hungarian native. Sometimes they come in small groups and one of them (leader) speaks Hungarian. As they arrive from a similar cultural situation therefore there is no integration difficulty as well as language problem. Most of them work in housekeeping, in the cleaning department and in the laundry. Recently there are also guest workers in the F/B. Several Recruitment Office organise this segment and this is the main basis of the daily outsourcing. In general, it can be said that their level of knowledge or skill are on a low level. This is the reason they can only perform simple tasks or job. VISZ is not too successful with their recruitment to be our member. We have some but the majority is uninteresting to us. We also have some legal problem among others they are out of the sector.</p> |
| ITALY | |
| FIPE | <p>On January 2019 FIPE has signed up the proposal Amala Tunisia. This proposal is entering into a consolidated collaboration with the Italian Directorate General for Immigration and the Integration Policies of the Ministry of Labour and Social Policies that brought FIPE beyond the national borders as a witness of Italian tourism enterprises.</p> <p>Amala Tunisia aims to contribute to the qualification of migration flows to Italy and also to promote efficient mechanisms of job-matching and to experiment innovative and sustainable ways for circular mobility of workers, the implementation of the proposal will have a positive impact on the entire region and will significantly influence its economic and social development.</p> <p>FIPE is continuing to put in place through awareness-raising activities and</p> |

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| | dissemination of its results to all its stakeholders through an open workshop later in the year. |
| LATVIA | |
| LAKRS | In the hospitality sector, communication with the customer has a main meaning. Customer wants to speak his / her mother tongue. In order to help refugees integrate into the sector, they need to learn a national language in a very high level, as well as a second official language. They have to know ethical norms, sanitary norms and basic principles of hospitality. In the 95% the biggest obstacle for not working in a main hall is the language barrier, so employers choose to employ such a staff in auxiliary kitchen work or as a bar assistants. |
| MALTA | |
| MHRA | <p>Initiatives are primarily coordinated by Jobs Plus, Malta's employment agency. Jobs Plus provides employment advisory services to refugees. A profile for candidates is established with information such as what skills they have and identify up-skilling needs. The agency provides tailor made guidance/professional services such as interpreters and cultural mediators and occupational therapists to help refugees find the right job.</p> <p>A job brokerage scheme was setup in 2016 to address irregular work and potential exploitation of migrant workers. Employers who require occasional labour market services for very short term can now do so in a regularised manner. file:///C:/Users/Daniel%20Debono/Downloads/ESPN%20-%20Flash%20Report%202017-23%20-%20MT%20-%20May%202017.pdf</p> <p>Other services by Jobs Plus include, short courses such as learning of basic English and Maltese, work readiness and work ethics (funded nationally), traineeships and work exposures (funded by ESIF).</p> <p>The UNHCR Malta office has also been collaborating with different stakeholders on an employment initiative. The scope of the initiative is to obtain an in-depth understanding of the opportunities and challenges in the employment sector of refugees as experienced from the perspective of employers, government and non-government employment agencies and refugees. Several workshops were held towards the end of 2018, in which the Malta Hotels and Restaurants Association participated. There are many challenges linked to the integration of refugees in the labour market that go beyond employers' remit. Some include lack of information/clarity on correct procedures to obtain permits; poor level of English, Maltese and IT; cultural differences; recognition of qualifications and skills; and opening bank accounts. The final report is still a work in progress.</p> |
| NORWAY | |
| Fellesforbundet | The government has programs for learning Norwegian language trough work. I couldn't find statistics. |
| SWEDEN | |
| HRF | Together with our counterpart, HRF has worked out a program called the fast track (Snabbspåret), especially for cooks. The purpose is that people who are far from the labour market or who are new in Sweden faster will come to work, this is done with walloping to ensure the level of knowledge of each individual. There is also regional collaboration with the social partners, but in these cases, it is not only immigrants who are affected even if it is the largest group. |
