

INTERNATIONAL LABOUR ORGANIZATION
Sectoral Activities Programme

Final report of the discussion

**Global Dialogue Forum on New Developments
and Challenges in the Hospitality and Tourism
Sector and their impact on Employment, Human
Resources Development and Industrial Relations**

Geneva, 23–24 November 2010

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Report of the discussion

Introduction

1. The Global Dialogue Forum on New Developments and Challenges in the Hospitality and Tourism Sector was held at the International Labour Office in Geneva from 23 to 24 November 2010. The Governing Body of the ILO had approved the convening of the Forum at its 304th Session (March 2009). Based on the agreed points of discussion, the Office had prepared an Issues paper¹ to serve as a basis for the Forum's deliberations. In particular, the Forum addressed job creation, sustained growth and fair globalization through decent work in the sector, its strong poverty reduction potential and the benefits of sharing good practices in this respect among developing countries, especially within the framework of South–South development cooperation.
2. The Forum was chaired by Mr I. Gusti Putu Laksaguna, Senior Adviser to the Minister of Culture and Tourism, Indonesia. The Chairperson of the Government group was Mr Virgil Seafield (South Africa). The spokespersons of the Employers' and Workers' groups were, respectively, Mr Francisco José Costa and Mr Norberto Latorre. The Secretary-General of the Forum was Ms Elizabeth Tinoco, Director of the Sectoral Activities Department (SECTOR), the Executive Secretary was Mr Wolfgang Weinz (SECTOR), and the Clerk was Mr John Myers (SECTOR).
3. The Forum was attended by 21 Government representatives and 18 advisers, from Argentina, Austria, Azerbaijan, Cambodia, Central African Republic, Congo, Cyprus, Czech Republic, Ecuador, Egypt, Greece, Indonesia, Japan, Malaysia, Mauritania, Nigeria, Philippines, Portugal, South Africa, Bolivarian Republic of Venezuela and Zimbabwe. Twenty Employer representatives and 32 Worker representatives also attended. In addition, representatives of the European Commission, the United Nations Development Programme (UNDP), the United Nations World Tourism Organization (UNWTO), the United Nations Conference on Trade and Development (UNCTAD), the International Hotel & Restaurant Association (IH&RA), the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Association (IUF), the International Organisation of Employers (IOE), the International Trade Union Confederation (ITUC) and the World Federation of Trade Unions (WFTU) participated.

Opening remarks

4. Mr Juan Somavia, Director-General of the ILO, highlighted the importance of the hotels, catering and tourism (HCT) sector in generating jobs worldwide. The industry contributed to some 235 million jobs, equivalent to one in every 12 jobs in the global workforce, and helped fulfil the needs of local communities. While the sector had been affected by the economic crisis, it had shown resilience, with employment increasing by 1 per cent. One of the challenges within the sector was to ensure decent work conditions and reduce precariousness. The success of the industry depended on staff commitment, loyalty and efficiency, all of which were immediately expressed through interactions with customers. Staff wages and working conditions were important elements that contributed to the success of the industry. Social dialogue and collective bargaining should be carried out in

¹ *Developments and challenges in the hospitality and tourism sector*, <http://www.ilo.org/public/english/dialogue/sector/techmeet/gdfhts10/gdfhts-paper.pdf>.

order to promote stability and efficiency within the workforce. The Decent Work Agenda of the ILO was founded on the key principles of social dignity, individual empowerment, human rights protection and gender equality. It also supported the concept of providing workers with conditions in which they could perform. In applying the Agenda to the HCT sector, positive outcomes should be sought for workers, companies and customers in order to ensure the distribution of benefits among all parties. The industry's contribution to the economy could be linked to poverty reduction, which was a high priority item on the G20 agenda and on that of the Fourth United Nations Conference on the Least Developed Countries, to be held in Istanbul in May 2011. In order for the sector to enable individuals to lift themselves out of poverty, it must provide the capacity and opportunity for them to do so; job creation was one way of achieving that goal. The sector also played a key role in opening people up to new cultures and promoting international understanding and communication, making it an important foundation of peace. Recalling the ILO–UNWTO 2008 agreement on cooperation to strengthen the capacities and activities of the two agencies in the field, he commended the UNWTO for its emphasis on decent work. The structure of the HCT sector was in flux, with direct management being overtaken by franchise schemes. The ILO was committed to making tourism a source of decent work, which was a key component of social justice; social justice itself was essential for social stability. The HCT sector had the capacity to be a key driver to economic recovery. He trusted that the Forum would enable participants to make proposals for ILO action.

5. Mr Taleb Rifai, Secretary-General of the UNWTO, agreed that the HCT sector was well placed to provide solutions to the current economic crisis. It was, however, a sector that was hard to define, as it was inexorably linked to many others, such as transport and agriculture. While that gave the HCT sector a large sphere of influence, it posed a challenge as it hindered efforts to bring the sector's partners together for the purposes of social dialogue. Even though some people regarded the HCT sector as elitist and irrelevant to achieving the Millennium Development Goals, in truth, tourism was an extremely important global phenomenon. It represented an explosion of human activity and generated some US\$3 billion a day. It also constituted the largest transfer of money from North to South. Globalization enabled people to move, be they migrant workers or tourists. However, the HCT sector faced uneven recovery owing to the austerity measures and taxes many governments were implementing. Another negative result of the economic crisis was that workers in the sector had become increasingly vulnerable to abusive work practices. In addition, the economic crisis had had a damaging impact on the environment, which could no longer be tolerated. The sector faced several challenges, including the tendency to employ low-skilled, low-paid workers and the unfavourable image of many jobs in the industry. In the future, it was fundamentally important that all parties adhered to the Decent Work Agenda.
6. The Worker spokesperson highlighted the importance of decent work – which included decent pay – and the need for sustainable tourism in order to address climate change. Everyone had the right to equitable working conditions and to equal pay for equal work. All workers should have the right to join trade unions, to have their physical and psychological well-being protected and to enjoy the benefits of social security. The increased use of technology within the sector and changes in the workplace had made workers more vulnerable, and child labour and informal work were on the increase. Cuts in social benefits, precarious contracts and labour fraud were additional elements of concern in the industry. While it was extremely difficult to establish common standards across countries that had different levels of development, if participants did not work towards that end, violence and social conflict would be unavoidable. There was a need to draw up standards to promote cooperation toward decent work for all, and experience had shown that to be possible only through social dialogue and cooperation. He proposed that several issues should be considered, including the enforcement of minimal labour standards, laws and relative conventions on freedom of association and child labour; the increase of outsourcing and the growth of small and medium-sized enterprises (SMEs); technical

training and the development of careers in the sector; requests for ILO technical assistance to develop and implement decent work in the sector, particularly in multinational companies, with emphasis on labour stability, unions and social dialogue; and motivations for governments to carry out vocational training.

7. The Employer spokesperson noted that the tourism and hospitality industry currently covered more than one third of all jobs in the service sector and that it had achieved growth at a time when States had expressed concern about the lack of jobs. The original definition of the HCT sector, established when the ILO Governing Body had created the ILO Industrial Committee for the sector in 1980, no longer embraced all the services that were currently being provided worldwide. In particular, the range of accommodation options had expanded and the new services were as yet unprotected. The Forum should study the changes in the provision of services and evaluate the consequences on employment, human resources and labour relations.
8. A brief overview of the background report prepared by the ILO for discussion at the Forum was presented by Ms Tinoco, Director of the Sectoral Activities Department. The major thematic chapters focused on:
 - the structure and characteristics of the HCT sector, particularly the predominance of on-call, casual, temporary, seasonal and part-time labour and the employment linkages with other sectors and subsectors;
 - the impact of the financial and economic crisis on the HCT industry, including the sector's potential to create new jobs both within and beyond the sector;
 - new forms of ownership and operations, especially the increasing prevalence of management contracts, lease agreements, franchise agreements, real estate investment trusts and private equity funds;
 - how major social and demographic trends, changing values in society and consumer perceptions promoted the development of new opportunities and products in the hospitality and tourism sector; and
 - the development of sustainable tourism and social dialogue.

The proposed points for discussion, listed on page 65 of the report, constituted a useful tool for tripartite dialogue and provided the ILO with a potential roadmap of the core elements participants had identified for social dialogue within the sector. Issues of importance included improving training and qualifications within the sector, the role of public-private partnerships in assisting recovery, the central importance of social dialogue, and strategies to promote decent work.

9. The Forum endorsed the following suggested points for discussion:
 1. The impact of the economic crisis on the HCT sector
 2. Ways towards recovery – Recent trends and developments in the sector
 3. New ownership patterns and their impact on employment, industrial relations, HRD and qualification needs
 4. Diversification of accommodation, operations and consumption and their impact on employment, industrial relations, HRD and qualification needs

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5. Strategies to promote social dialogue and sustainable tourism
 6. Suggestions for future ILO action

Point 1: The impact of the economic crisis on the HCT sector

10. Mr Weinz, ILO Technical Specialist for the Hotels, Catering and Tourism sector, indicated that the contribution of the tourism sector to global gross domestic product (GDP) was expected to rise from 9.2 per cent in 2010 to 9.6 per cent by 2020. Real GDP growth was expected to be 0.5 per cent in 2010 compared to a contraction of -4.8 per cent in 2009. The sector was projected to have significant employment growth, from 8.1 per cent of total employment in 2010 to 9.2 per cent by 2020. In 2010, investment in the sector was estimated to be 9.2 per cent of total investments; by 2020, it should reach 9.4 per cent. Moreover, export earnings from international visitors in 2010 were expected to account for 6.1 per cent of total exports. After presenting data from 2008 to 2010 on regional percentage change in employment in hotels and restaurants, and changes in average actual weekly working hours in hotels and restaurants for the same period, he turned to trends in international arrivals in 2010. Between January and August, they had continued the recovery that had begun at the end of 2009, and had surpassed the 2008 pre-crisis record by about 40 million arrivals compared to the same period in 2009, and 1 million more than the same period in 2008. Results had been positive in all regions, although emerging economies continued to lead the increase with 8 per cent growth, with advanced economies growing at 5 per cent. Europe was recovering slowly, at 3 per cent growth, compared to 14 per cent in Asia and the Pacific, and 16 per cent in the Middle East. A total increase of 5 to 6 per cent was expected for the year 2010. In 2010, international tourism receipts had grown about 5 to 6 per cent, and international tourism expenditure had shown strong increases in emerging markets, with more modest growth in traditional source markets.
11. The Worker spokesperson, referring to section 1.4 of the background paper, stressed that informal employment was unacceptable and that it resulted in exploitation and precarious work. Informal workers lacked social protection, their right to work was negated and the fundamental principles of solidarity ignored. Furthermore, informal work was an example of other types of exploitation, such as child labour. States also suffered from the phenomenon of informal employment as it did not generate tax income. It was therefore bad business and companies that broke the law should be held to account.
12. An Employer representative noted that section 1.4 referred to full-time, part-time, temporary, casual and seasonal employment, but not to informal workers, apart from mention of indirect links to the informal economy such as street vending. Flexibility and temporary work should be supported, as the nature of the sector required flexible forms of contracting staff.
13. The Worker spokesperson maintained that the section referred to informal employment, with “formal establishments offering black market jobs” and requested that such wording be avoided, to remove any sense of approbation for informal work.
14. A Government representative of South Africa highlighted that the background report contained scant information on tourism in developing countries, instead broadly examining tourism in developed countries. Equal focus should be placed on developed and developing countries.
15. The Government representative of the Philippines emphasized that, since the HCT sector was one of the fastest growing in the global economy and was extremely labour intensive, it provided a significant source of employment. While the economic crisis might have

resulted in increased unemployment and economic and social insecurity for everyone in the sector, it had also brought about innovative schemes for continued employment and new productive modes of operation and management in the sector. Further discussion should consider the definition of the hotel and tourism sector, as there were currently several different definitions; the need for coherence and capacity building in data collection; the effects of the economic crisis on employment and industrial relations; basic competencies in the sector; tourism and migration; coherence in sectoral policies, requiring dialogue between labour and tourism ministries and governments and other partners; and public–private partnerships.

16. An Employer member suggested that the discussion should place more focus on regional differences and should be based on a more detailed analysis of the diversification of companies. The data on which the claims that employment in the HCT sector had decreased in the Americas had surely come from sources in the United States, since many Latin American countries had not seen that same pattern. In addition, it would be useful to compare the employment rates in tourism with those in other sectors and in the rest of the world.

Point 2: Ways towards recovery – Recent trends and developments in the sector

17. In his presentation entitled “Ways towards recovery: External relations and partnerships”, Mr Márcio Favilla L. de Paula, Executive Director, UNWTO, noted that tourism was the largest generator of employment for young people and women and that it provided opportunities for under-qualified people as well as those who were highly qualified. However, it was imperative that the HCT sector offer more career opportunities, indeed, that would be of benefit to everyone. The sector was an important means of distributing wealth within a country and between countries. While tourism had the potential to damage the culture and environment of a country, it could also assist in their preservation, and could help to bring about peace. Tourism generated wealth in both advanced and developing countries. There had indeed been a 5 to 6 per cent increase in tourism in 2010 globally, but there had been many regional and subregional differences. In comparison to a relatively poor performance in Europe, for example, tourism in the Sub-Saharan region of Africa had seen significant growth in recent times and in Asia and the Middle East, the number of international arrivals was expected to increase by 4 to 5 per cent in 2011. There were other interesting trends in international arrivals: while in 1980, only 30 per cent had come from developing countries, by 2009, that figure had risen to 50 per cent. International tourism was growing in every sphere. Many emerging economies had benefited from international arrivals and had the potential for further growth. Marketing was the key to developing tourism, and the long-term challenge was sustainability in economic, social and cultural terms. Poverty reduction was also fundamental in order to benefit a large sector of the world’s population. Moreover, domestic tourism was essential when international tourism waned, since it was then countries’ own citizens that kept businesses running and workers in jobs. Overall, while growth in the sector had been slower than in the last decade, there had been a significant increase in international arrivals and domestic tourism. It was likely that when more countries became more aware of tourism and invested more, there would be more noticeable growth. Addressing poverty reduction would assist in attracting large parts of the population into the sector. The UNWTO applauded South Africa and Africa as a whole for its remarkable success in tourism and for organizing the 2010 FIFA football World Cup.
18. The Worker spokesperson voiced the concern that, despite the almost 100 per cent increase in tourist arrivals over the past 15 years, employment in the sector had increased by only about 20 per cent. If, in fact, similar numbers of workers were providing the same services for double the number of tourists, working conditions, the quality of work and salaries

should be carefully examined. In many countries, the HCT sector was not an attractive option for workers, about 50 per cent of whom worked on a seasonal basis only. Training was a necessity, and cooperation with the ILO was imperative in order to examine the situation of workers. One Worker member observed that only about 20 per cent of those working in the HCT sector in Egypt enjoyed social protection; the remaining 80 per cent worked in the informal sector. As a result of the economic crisis, over 14,000 former HCT employees had been left with no work, income or social protection. While tourism did offer young people the opportunity for employment, the standards often did not reflect the principles of decent work. Another Worker member highlighted the situation of women working in tourism in Egypt. They made up about 50 per cent of the workforce in the sector. There was huge inequality between male and female workers in the sector, many women losing their jobs or being given only short-term contracts when they reached middle age. Furthermore, the 12 per cent hotel commission payable in Egypt was often deemed to be the salary of the employee. Given that disputes with customers were usually resolved by reducing the commission, this usually resulted in less money for the worker.

- 19.** The Employer spokesperson noted that the sector had shown great resilience during the economic crisis. Cooperation between States was of utmost importance in difficult times to mitigate the effect on tourism, which was an important source of income. It was unrealistic to expect growth in arrivals to be directly proportionate to the increase in employment generated in the sector. An Employer member noted that, while there had indeed been an increase in the number of tourist arrivals, there had been a significant shift towards more, but shorter, vacations. Over the past 20 years, there had been no change in the number of hotel rooms cleaned by chambermaids, or in the number of guests served by each waiter. Another Employer member warned that the higher taxes some governments were levying on tourism in order to balance their accounts would result in lower income for employers and might lead to a fall in employment in the sector. The UNWTO should caution against that practice in order to avoid such a scenario.
- 20.** Government representatives from Asia and the Pacific raised a number of issues of concern in their region. The Government representative of Cambodia said that his country was one of five Asian states that had achieved a positive growth rate. His Government attached great importance to the quality of tourist services and provided professional training in the HCT sector. It also allocated funding to the private sector to train unemployed workers at training centres. The Ministry of Tourism was encouraging public–private partnerships, which would continue to play an important role in the future of the tourism sector. The Government representative of the Philippines cautioned against complacency and said that the strengths and weaknesses of the tourism industry should be analysed in order to prepare for future crises. The ILO should address social protection and employment in the sector more vigorously.
- 21.** The Worker spokesperson called for workers to be involved in public–private partnership schemes of the type mentioned by the Government representative of Cambodia.
- 22.** The Government member of Greece, who was also a representative of the Greek Manpower Employment Organization, informed the forum that his organization, the main national body for implementing labour market policy, was currently working on two programmes. The objective of the first was to maintain the employment rate at 2009 levels and to extend the tourist season, encouraging hotels to hire the same number of employees as they had in April, May and October of 2009. The programme had achieved a participation rate of about 75 per cent and would culminate at the end of November 2010. The second programme involved subsidizing labour costs. It had ended in September 2010 and had reached 70 per cent participation. He invited Forum participants to visit his organization’s web page at www.oaed.gr for more information.

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23. The Government representative of Nigeria emphasized the role of governments in assisting the private sector, especially in providing infrastructure. In Nigeria the Government had developed and was implementing a national plan for tourism involving all the social partners. He agreed that there was a real need for training within the sector.
 24. The representative of the UNWTO said that his organization fully supported the Decent Work Agenda and was working with the ILO and the United Nations Statistics Division to define and measure work in tourism in several countries. The 2008 international recommendation on tourism statistics was currently implemented in some 53 countries. However, the UNWTO relied on governments to provide it with accurate data. The UNWTO had been collecting data on international tourism since 1950. Interestingly, 2011 would be the first year in which the compendium would include data on growing domestic tourism. In October 2011, the UNWTO would publish its study into trends and visions for 2030. Some of the key trends that had been identified were the growing number of tourist destinations and the fact that people travelled more frequently but took shorter vacations.

Point 3: New ownership patterns and their impact on employment, industrial relations, HRD and qualification needs

25. The representative of the IUF, Ms Lisa Eldret, Coordinator for Hotels, Restaurants, Catering and Tourism, observed that new patterns of hotel ownership were extending rapidly away from direct ownership and multinational chains. Accor had sold 800 properties since 2005, while Marriot now owned only six of its 3,400 branded hotels and Intercontinental retained only 16 out of its 4,000. The role of private equity was also growing; Blackstone, a private equity company, was now the world's largest hotelier by number of rooms. Management contracts, franchise agreements and lease agreements had become popular in the industry. In 2008, 53 per cent of Starwood's revenue had come from management fees. Some 75 per cent of Intercontinental hotels operated under franchise agreements and about 85 per cent of Rezidor hotels in Europe were run under management contracts, meaning that the workers were often not employed by Rezidor. The lack of a direct employment relationship between the operator and workers made it difficult to define employers' responsibilities. The operators might have mission statements, but they were difficult to monitor and implement and those new ownership patterns could be problematic for social dialogue. Starwood operated in 23 European countries, only seven of which were represented in the European Works Councils (EWCs). Hilton had reduced the number of countries participating in its EWCs from 22 to ten. Similar problems existed at national level; social dialogue and global agreements between the IUF and multinational operators could be difficult to implement locally. In addition, the short-term nature of private equity investment had led to increased precariousness in employment, increasing workloads and a lack of training. Interviews with workers and union representatives had revealed that the role of human resources development had shifted from developing the workforce to cost cutting and generating profits. In the future, hotel operators should strengthen their operating contracts to stipulate compliance with ILO standards. Responsibilities between owners and operators should be clarified, and brand owners should define clear processes to implement their mission statements and CSR policies. It would also be useful if the ILO could undertake research on the increasing recurrence to casual labour in the sector.
26. One Employer member noted that the IUF presentation had referred only to hotel chains. According to the ILO background report, the ten largest chains owned only 30,000 hotels, whereas there were over 300,000 hotels in the world. It was inaccurate to argue that employment responsibility and relationships were ill-defined in new ownership patterns; such relationships were always set out in contracts that reflected changes in ownership. All

hotels made investments in order to protect their name and property. Human resources had not been devalued by new ownership patterns; the concept of human resources development had only come into existence in the last ten years. Most human resources staff were lawyers or other specialists who did their jobs properly without any confusion as to their roles and responsibilities. All Employers respected national laws on issues such as investment changes and minimum wages. Employers took great risks to invest in hotels, and they engaged staff and paid their taxes in accordance with domestic legislation. Another Employer member agreed that changing ownership patterns should not be a cause for alarm. It was in the interests of hotel chains to continue investing in training in order to benefit their brands. Operator agreements with owners always included provisions on employment and training. In developing countries, hotels should not be required to adhere strictly to regular, full-time employment contracts, otherwise casual workers hired to meet the needs of the hotels might find themselves out of work. It was in the interests of the workforce that some degree of employment flexibility be tolerated.

27. The Worker spokesperson noted that many hotel employees were exploited in Latin American countries. With independent hotel owners, workers and unions knew who they were talking to, but with chains, they did not know if the owner was the person physically present in the hotel or someone else in the chain. In chains, unions often could not operate freely, but had to hide their activities and were excluded from negotiating processes. ILO research was therefore needed on ownership issues and the implications for workers. Worker members from Europe underlined issues of outsourcing and coverage by regional agreements. One Worker member noted that the Intercontinental hotel chain had sold several hotels in Europe to the investment firm Morgan Stanley; the hotels' employer was now a private equity fund that was part of Morgan Stanley. That had resulted in key functions, such as laundry services, being outsourced. Dirty laundry from the Vienna hotel was now shipped to Bratislava in the Slovak Republic and returned clean to Vienna, which had meant a 25 per cent drop in employment in the Vienna hotel. Private investment funds were not interested in hotel management but in maximizing profit, and in difficult financial times, in cutting costs and selling at a profit as quickly as possible. The issues of ownership change were not as simple as the Employers had described; workers experienced many problems with private investment fund ownership of hotels. Another Worker member insisted on the need for better protection of workers' rights in hotel chains. Many chains were exempt from EWC agreements, especially when their headquarters were located outside of the jurisdiction of European countries. Agreements were needed to cover all hotels in a chain that operated in Europe. The example of Rezidor cited by the IUF representative was a good one, and there were many other examples of hotel chains with large workforces in franchises that were not covered by agreements.

28. A Worker member from the United States noted that, in her country, most full service hotel rooms came under a major brand. However, only 25 per cent of them were operated by the brand, and the remainder were operated by another company altogether. Collective bargaining agreements could be concluded with the operators, but the existing legislation did not cover the major brands, meaning that many workers had no employment protection under the law. Hotel ownership by private equity funds had exploded in the United States in recent years, with the result that outsourcing had increased and investments in workers, such as training and decent pay, had decreased considerably. The trend had started with the Marriot chain in the early 1990s, when all its property had been spun off to a separate company whose financial operations were maintained completely separate from Marriot, which remained the hotel operator. That separation of real estate management had enabled the owner of the hotel building to have maximum flexibility in deciding what to do with the property; for example, whether to continue to allow its use as a hotel or change it to another use. That trend should be better understood, since it would eventually come to all countries. There was an enormous range of hotel investment patterns in the United States, from independent owners of property to all kinds of off-site owners and everything in between. Some operators accepted unions and collective bargaining where the owners

might oppose them, but in general, it was difficult for workers to maintain good labour relations where owners were different from operators. The increasing trend posed real difficulties for workers and underlined the need for full collective bargaining to cover all ownership patterns.

- 29.** The Government spokesperson (the Government representative of South Africa) indicated that it was important to bear in mind that there were many different forms of hotel ownership, especially in developing countries, including ownership by SMEs, community ownership and ownership by other tourism entities. Those types of ownership should also be taken into consideration, as it was often in that area that workers' rights were abused and where different employment patterns were emerging. The Government representative of the Philippines added that governments had a responsibility to identify the employer, whether it was the owner or the manager of a hotel, and to ensure adherence to the rules imposed by law. It was easier to implement standards in countries where unions already existed. However, as the Government representative of Mauritania pointed out, some countries had not yet drawn up the relevant provisions of domestic regulation. Even where there was national legislation, some franchises were not subject to it. In his country, many workers employed by international organizations enjoyed better working conditions than those who worked for national companies. Given that the Forum was not only on developments but also on challenges in the hospitality and tourism sector, it was incumbent on all participants to consider innovative solutions in support of decent work. With ILO assistance, governments should take responsibility for developing and implementing regulations on working conditions in the HCT sector.
- 30.** An Employer member observed that change was not always negative. Hotel owners should be able to do whatever they wished with their own money and questioned the need to involve a third party, such as a trade union, in recruitment matters. It was always possible to make requests to a management company concerning workers' rights. Regarding the focus on ownership by major hotel chains, he said that the chains usually adhered to the rules. It was important to bear in mind that the hospitality industry played a role in reducing poverty, as it was opening ten new hotels every day at a time when other industries were closing down. It was one industry where people could not be replaced by machines; the employers and the workers therefore shared a mutual interest in that regard. He wondered, therefore, why the employers in the hospitality industry were seen as the enemy. Another Employer member objected to the emphasis that was being placed on the world's top hotel chains, stressing that the problems arose when governments did not have appropriate rules.
- 31.** The Worker spokesperson explained that his group's concern, with regard to multinational hotel chains lay in the fact that, in many cases, the workers did not know who their employer was. The only visible "employer" was often the hotel manager, who was usually bound by standards imposed from above. Hotel owners should provide mechanisms to enable workers to discuss and reach agreement on any situation concerning them. One Worker member noted that in Egypt, there was no clear link between the management and the ownership of hotels, whether in the private or the public sector, and that had a negative impact on employment. Management companies relied heavily on casual labour and offered their workers very low wages, no social protection, no training and none of the other benefits that might be achieved through collective bargaining. He disagreed with the Employer member who had suggested that changes in ownership had no impact on workers. In many cases, especially in developing countries, multinational hotel chains were exploiting their workers in full view of governments, who showed no interest in taking action and simply wanted to encourage investment. Emphasizing the importance of understanding the context of the debate, another Worker member urged the different groups to try to understand each other in a spirit of engagement in order to move forward. While ownership by a multinational company did not necessarily pose a problem, patterns of ownership had to be analysed, as problems often arose when patterns changed. Many

references had been made to the issue of job creation, but there had been little discussion about the type of jobs that should be created. The hospitality industry was dependent on seasonal peaks, which led to exploitation; subcontracting often ran counter to decent work; and while workers in the hospitality industry often depended on tips, there were no laws to regulate tipping in many countries. There was a real need for better training to allow workers to compete beyond the scope of their current employment. In the light of changing employment patterns, although employers were finding it easier to engage in social dialogue, such dialogue was becoming a substitute for collective bargaining. Another Worker member pointed out that table 7 in the background report showed that over US\$90 billion had been handled in selected public-to-private hospitality firm transactions in 2004 to 2007, a sum far greater than the total GDP of many of the ILO's member States. Questioning whether participants were indifferent to the fact that the major hotel and restaurant chains represented about 20 per cent of the market share, he noted by way of example that when Microsoft launched a technological innovation, the smaller enterprises usually followed suit and adopted whatever the new development might be. Similarly, the SMEs in the hotel and restaurant sector were more or less obliged to follow the lead of the big hotel and restaurant chains.

32. An Employer representative observed that, in all sectors, employers supported the fact that enterprises had to respect the laws of the countries in which they operated. They championed the 1998 ILO Declaration on Fundamental Principles and Rights at Work, including workers' rights to freedom of association and social dialogue. However, it was the responsibility of governments, through their labour administration and legislative implementation bodies, to ensure that domestic legislation was respected. It was out of the question to shift that responsibility to enterprises or any individual entities.
33. The Government spokesperson stated that, while he agreed up to a point, responsibility for ensuring respect for labour law was shared between governments, employers and workers; it was a question of compliance as well as enforcement. The Forum should formulate proposals on how to maximize social dialogue, encompassing all social partners, regardless of the size and structure of any entity. It was necessary to find ways of empowering the parties to engage in the social dialogue process, including workers in the informal sector, in order to set standards that were applicable across all operations.
34. The representative of the IUF observed that, while the trend towards branded or management-operated hotels was not as common in Europe as in North America, such establishment nonetheless held about 20 per cent of the market share and the trend was unlikely to reverse. That required social dialogue both at global and national levels to formulate policies, with input from employers and workers, which must then be implemented at local level.

Point 4: Diversification of accommodation, operations and consumption and their impact on employment, industrial relations, HRD and qualification needs

35. The representative of the Federación Empresaria Hotelera Gastronómica de la República Argentina (FEHGRA), Mr Jordi J. Busquets, remarked that, over the past few years, some 50,000 small enterprises had been set up, offering new facilities in the tourist accommodation and restaurants sector in the world and it was estimated that these new formats and arrangements represented more than 5 per cent of total supply in South America. While hotel chains had traditionally provided most tourist accommodation, other options had now developed including boutique hotels, villas, residential apartments, bed and breakfasts, hostels, rural accommodation establishments, condominium hotels and

apartment hotels. In order to examine the impact of that diversification of accommodation, his organization had interviewed 60 companies in 14 countries in the Americas. It had found that these new formats were not generally covered by national, regional or local laws for classification and categorization, which referred to hotels only. This situation created problems of unfair competition (the best known examples were the cases of apartments being made available for hire, with or without hotel services) and of representation because the owners/managers of such establishments did not feel represented by employer organizations, while workers employed in these new formats did not feel represented by the trade unions. This should not be considered as a regional issue in Latin America because, in July 2010, New York State had approved legislation banning the illegal conversion of housing designated for permanent occupancy into hotels. There was a clear need for reform of the system so that it covered all types of tourist accommodation. In ten of the countries which had responded to the questionnaire, tourist accommodation diversification was a growing trend, with over 5 per cent of total accommodation being offered by non-traditional, unregulated establishments. In Argentina, there was 40 to 50 per cent more tourist accommodation on offer in exclusive apartments than in 4 and 5 star hotels (percentage based on new investment in accommodation). Such apartments offered no guarantees to customers, and were usually booked on the Internet.

- 36.** The Employer spokesperson suggested that the ILO and the UNWTO should conduct joint research into that phenomenon. There were clear regional differences in that regard. It was true that the providers of the new types of accommodation did not train their workers and were a source of unfair competition. Apartments were now regularly rented out to tourists in many cities as well as in more traditional holiday destinations. All governments should amend their legislation to provide for the new diversity of tourist accommodation. Some accommodation on offer provided for very specialist areas in the tourist industry. Several boutique hotels in Buenos Aires, for example, catered for tourists with an interest in tango; the hotel staff had specialist knowledge in that area, thus providing for a niche market. Training and development in such specialist areas was not available in the traditional hotel sector.
- 37.** The Worker spokesperson, endorsing the points the Employer spokesperson had made, added that workers had a role to play in helping to regulate the entire tourist accommodation sector. A Worker member observed that the sector was essentially self-regulatory. Given that there were several ILO Conventions concerning the tourist industry, which had been agreed upon by the social partners, it might be more useful to call on those governments that had not yet done so to ratify those instruments in an effort to improve regulation. In addition, in order to create a sustainable economy and achieve decent work, enterprises must be sustainable. Rather than focusing solely on employment creation, the quality of employment should also be taken into consideration.
- 38.** The Government spokesperson indicated that, while regulation and standard setting was necessary in all hotels, catering and accommodation establishments, governments should guard against over-regulation. The Government representative of Nigeria agreed with that point and called for a new definition of the tourism industry that covered all the new types of accommodation on offer. It would be useful to examine what impact the diversification of tourist accommodation was having on social dialogue, initial training and lifelong training.
- 39.** The Government spokesperson argued that future discussion of that issue should include a focus on skills development to promote decent work and universal access to hospitality and tourism facilities for people with disabilities. There was also a need to examine the extent to which new tourism formats in health, sports and the environment impacted workers in the sector. The Government member of the Philippines, supported by his colleague from Ecuador, suggested that future discussion should also consider the plight of migrant workers, who tended to fill gaps in low-skilled positions.

Point 5: Strategies to promote social dialogue and sustainable tourism

40. An Employer member noted that discussions in the Employers' group had highlighted many problems in the HCT sector regarding social dialogue, working time and the treatment of several categories within the workforce including part-time, female and migrant workers. It was important to improve access to information from the HCT sector about experience with social dialogue, best practices and cooperation between employer and worker organizations, as such information would all have a positive impact.
41. The Worker spokesperson observed that the ILO's Employment Policy (Supplementary Provisions) Recommendation, 1984 (No. 169), and the Decent Work Agenda were highly pertinent to the discussion of social dialogue and sustainable tourism. A Worker member said that there appeared to be consensus on the need to improve the quality of services provided by the sector and the working conditions within it. While decent work should indeed be the goal, it was questionable whether that was possible while subcontracting continued. In some countries, workers were hired directly from the streets without any training; they were usually exploited and had no hope of sustainable employment. Many employment agents did not even have offices, but just a mobile telephone number. In order for workers to improve their lives and those of their families, they needed professional and continuous training. He urged the ILO to continue its studies into the sector. Another Worker member observed that, in order for tourism to be sustainable, people needed places to visit, accommodation, means of transportation and places to eat, but also need the time and money to go on holiday. For workers, that meant reducing working time, having paid annual leave and a decent income. Trade unions had been fighting for those goals for the past 100 years. High social standards and social rights were needed by both workers and the tourism industry at large. It was clear that countries with high social standards, such as those in Europe, were attractive tourist destinations. Governments should focus on granting decent work and wages and improving social conditions in their countries. Another Worker member noted the importance of the tourism sector in relation to other sectors within the economy. There was a need to engage with multinational corporations in order to produce agreements to improve conditions within the sector. The ILO might consider developing International Framework Agreements (IFAs) between trade unions and multinational companies which could serve as a means to engage in social dialogue among all parties.
42. The Government spokesperson remarked that, given the complexity of the issues under discussion, there was insufficient time in a two-day forum to reach consensus. However, he urged participants not to lose sight of the broader issues, such as those listed in the Global Jobs Pact, including generating employment, respecting labour standards and developing sustainable economies. Sustainable enterprises were a reality within the hospitality sector, which should be taken into consideration in the capacity-building process. Given that the tourism industry was not limited to the hotel industry, participants should take account of all SMEs, including community-based organizations which could contribute to social dialogue. There was also a need to establish a mechanism to generate more comparable statistics in the sector. He urged the ILO to extend the Sustaining Competitive and Responsible Enterprises (SCORE) global assistance project worldwide. Policies should be implemented to improve access to finance and provide other incentives to establish SMEs within the hospitality sector. Forum participants should consider ways of maximizing social dialogue with a view to encouraging governments to take steps to address concerns about the use of casual labour and outsourcing. The Government representative of Cyprus added that every effort should be made to protect the rights and improve the conditions of workers in the HCT sector, since they were the human capital of the sector. The ILO and the UNWTO should cooperate in an effort to improve the legislative regulation of human resource issues in the sector, which was lacking in some countries. There was also a need for standard setting for the products and services offered by the sector.

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43. Government representatives from Asia and the Pacific raised several issues of concern to the countries of their region. The Government representative of Cambodia stated that vocational training was important for workers per se, but also in view of the fact that, in order to be effective, social dialogue required competent, skilled, educated workers. The Government representative of the Philippines noted that sustainable tourism had a vital role to play in generating income and decent work and ensuring the viability and competitiveness of enterprises. It was also important to increase vocational training and improve working conditions, including health and safety. While social dialogue could be initiated by workers and employers, governments should provide the conditions for such dialogue, which might entail establishing regulatory bodies. In the Philippines, the Government supported social dialogue at all levels, including at the national level and through advisory bodies with tripartite membership. The ILO was a good source of information, providing examples of best practices, and had developed useful training and capacity-building programmes. The Government representative of Malaysia noted that employment in the HCT sector had changed over the last decade, driven by globalization, technological advances, and structural change. In order to promote employment and job security, appropriate wages and social protection were needed. All parties should cooperate in efforts to implement the Decent Work Agenda, reduce poverty and promote equitable development; tripartite consultation was the key to the social dialogue process. The social partners, through tripartite dialogue, could take measures to improve employment situations, reduce accidents and settle trade disputes, which would ultimately improve productivity and product quality. Social dialogue could also be a means to monitor the labour market and identify latest trends or areas that required enhancement. Governments must facilitate social dialogue to promote harmony among parties and meet those objectives.
44. The Employer spokesperson requested that the importance of the activities of SMEs should be reflected in the next evaluation of the HCT sector. There was a clear need for decent, productive work in sustainable companies and in a sustainable environment. It was also essential that social dialogue was promoted in every area of HCT, without the obligation to abide by predetermined forms – every country should carry out social dialogue in an appropriate manner. A sustainable environment was necessary to provide the context for sustainable tourism, one which was inclusive and embraced the new forms of tourist accommodation that were part of the contemporary reality of the industry. Staff training was also fundamental in order to ensure that employees could adapt to the changing demands of the market. One Employer member asserted that social dialogue should not be conducted on a regional or international level; it should always be held at the local level in order to ensure that it respected local legislation and conditions. Another Employer member noted that there had been little time to analyse the huge growth in the tourism industry, which had created new realities for all concerned. The three parties present at the Forum complemented each other and all had important roles to play in ensuring that, wherever investment in tourism came from, dialogue took place at the local level. It was impossible to discuss decent work on a global level because it was always based on individual situations and activities. Decent work was sadly not a reality worldwide; one of the outcomes of the Forum should be to recall that decent work was a duty for all parties, regardless of where they were in the world. The tourist industry had the ability to support sustainable development in many locations, but all stakeholders had to be involved, focusing on points of consensus and undertaking further discussions where agreement had not yet been reached.
45. The Worker spokesperson called for future ILO action to include measures to convene all the relevant actors to analyse working conditions in the HCT industry, including pay. The ILO should also renew its efforts to promote the ratification and implementation of the Working Conditions (Hotels and Restaurants) Convention, 1991 (No. 172). Moreover, efforts should be made to ensure that tourist operators, including chains and restaurants and all outsourced agencies, included provisions stipulating minimum working standards

and the core conventions in their employees' contracts. The contracts should contain explicit reference to working hours and the elimination of child labour and labour discrimination. That would help workers to access and participate in social dialogue. The ILO should also examine the situation of precarious work, gender equality, child labour and migrant workers in the HCT sector. In addition, based on the 2008 ILO Declaration on Social Justice for a Fair Globalization, the Office should promote dialogue on IFAs between national and multinational companies and between trade unions at the sectoral, national and global levels. It should foster all forms of social dialogue, including cooperation and collective bargaining at industry level. The ILO should examine the role of foreign direct investment in tourism and the impact it was having on employment and the concept of decent work in the broadest sense. Its work should include projects to achieve IFAs and standards on corporate responsibility. The ILO should organize activities to support the mandate of the HCT sector to build capacity in professional relations. Training should satisfy the needs of the sector and workers' needs at all levels, which would require measures to promote access to qualifications, training, on-the-job training and career development. He suggested that the ILO should organize national and regional seminars on decent work and sustainable tourism through social dialogue in 2012 and 2013. Lastly, he suggested that between all participants, a framework agreement at the international level could be drawn up, corresponding to the criteria agreed at the meeting.

46. A Worker member remarked that there were several examples of effective social dialogue at the regional level, including in Europe and Latin America. All that was needed was political will on the part of employers and trade union organizations. The ILO should take note of the fact that regional blocs were important players. Another Worker member said that the premise for social dialogue should be necessity, not acceptability. Given the changing patterns of ownership in the sector, measures should be taken to ensure that both employers and management companies were liable in all situations involving fundamental disputes. In addition, given the ever-evolving nature of the industry, skills development was fundamental. Training and development should not, however, be restricted to helping people to do what they were doing better. Rather, it should enable them to grow beyond their current abilities, so that in future, no worker would hold a lowly post for years on end.

Point 6: Suggestions for future ILO action

47. The Government spokesperson stressed the need to establish a definition of the hospitality sector that was valid worldwide. Furthermore, all activities involved in the HCT sector should be covered in the report of the Forum, including transport, illustrating how social dialogue could infuse a single identity in the sector. The changing nature of the industry lent itself to different forms of employment, which required skills development and capacity building. While it was difficult for governments to regulate the sector without over-regulating, steps should be taken to examine how to develop skills within the sector to meet changing demands. The ILO should consider how to extend financing to SMEs in the HCT industry, and how to promote their establishment and development. Owing to the nature of the sector, there was a need to deal with employment in different ways – there would, for example, always be a need for taxi drivers and hotel receptionists who were willing to work at night. Governments needed to be able to regulate such employment in an appropriate way. It was also necessary to consider how changing employment patterns led to precarious situations in the sector. The ILO should build capacity for social dialogue across regions – a great deal of tourism was, by its very nature, cross-border and interregional. At the local level, Decent Work Country Programmes (DWCPs) should be used to protect workers from precarious employment opportunities. The impact of the financial and economic crisis on global migration patterns and therefore on employment in the HCT sector should be examined.

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48. The Government representative of Japan said that many issues needed to be addressed when countries received high numbers of international tourists. Such areas included the effects on the environment, demographic issues, retaining traditions and cultural experiences. Individual countries could not address those issues alone; global cooperation was necessary.
 49. The Government representative of Malaysia observed that jobs in the hospitality industry were often portrayed negatively because of poor or unattractive working conditions. There was no demand for such jobs. He urged the ILO to conduct research on how the conditions of the least-skilled jobs could be improved to make them more appealing to workers.
 50. The Government representative of the Philippines observed that, in the context of sustainable development, the issues that had been raised would need to be addressed periodically in future discussions. As they would continue to evolve, partners should be prepared to examine, for example, public–private partnerships, migration, the definition of the hospitality and tourism sector, data collection and analysis, skills development, social dialogue and the role of the social partners at regular intervals. He suggested that the ILO should continue to analyse trends and organize meetings where the social partners could meet.

Panel discussion on poverty reduction through tourism

51. The first panellist, Mr Mohamed Mahmoud Ba Ould Ne, Government representative of Mauritania, launched the discussion by describing how his country had chosen to develop sustainable tourism with a focus on reducing poverty among the local population. The authorities had placed emphasis on generating employment, utilizing local skills and promoting the national heritage. While the number of tourists travelling to his country was still relatively low, poverty had reduced from 54 to 24 per cent over six years in one region. Tripartite partnership had played an important role in developing such tourism, particularly in negotiations with small local operators. The next panellist, Mr Neb Samouth, Government representative of Cambodia, said that tourism accounted for about 18 per cent of GDP in his country, and was widely regarded as an efficient way of reducing poverty. Drawing attention to the cultural and natural beauty of the country, community-based tourism and ecotourism had benefited over 30 local communities, providing alternative sources of income and employment. Local projects helped to protect natural resources and provided a good platform for social dialogue. However, ILO assistance would be useful in building local capacity in marketing and financial management in order to guarantee that tourist revenue benefited local people. The third panellist, Mr Ron Oswald, General Secretary of the IUF, noted that organizing workers in trade unions had proved to be one of the most effective ways to raise people out of poverty. The HCT sector should stop exploiting its workers and recognize that it was more effective to give them opportunities to develop. Tourism created economic growth, but only reduced poverty if the right strategies were used. Workers' rights, particularly those of young people, women and migrant workers, needed to be upheld in the sector, and efforts made to increase wages, provide more permanent contracts and guarantee the right to collective bargaining. The last panellist, Dr Ghassan Aidi, President of the IH&RA, pointed out that tourism had been the only sector to grow during the economic crisis. That growth had generated employment and thus helped reduce poverty. The industry created decent, productive, and sustainable work. While many people employed in the sector were trade union members, in some countries employers preferred to encourage direct dialogue with their workers. Employers also understood and supported the need to train workers in the sector. He also drew attention to the fact that the tourist industry had been one of the first to take action to protect the environment by lowering its greenhouse gas emissions.

52. The ensuing discussion focused on the importance of trade unions as mechanisms to foster social dialogue and uphold respect of workers' rights, the need to respect the universal right to belong to a union, and unions' duty to facilitate training opportunities for their members. All partners in the HCT sector were urged to take steps to combat precarious employment and reduce workers' vulnerability by creating sustainable jobs that were not seasonal. The need for increased political will to develop tourism in Africa was also raised. Tourism was clearly a good means of generating employment and, with the right strategies, could help reduce poverty. In addition, tourism could raise public awareness of the need to combat climatic change.

Consideration and adoption of points of consensus

53. The Forum participants received a draft paper presenting a set of points of consensus, which had been prepared by the Office on the basis of the Forum's debate. Having first discussed the draft in their respective groups, the participants returned to the final plenary meeting, where agreement was reached on a variety of amendments to those points of consensus. The revised points of consensus are attached as an annex to this report.

Points of consensus

Preamble

Government, Employer and Worker representatives attended the Global Dialogue Forum on New Developments and Challenges in the Hospitality and Tourism Sectors and their Impact on Employment, Human Resources Development and Industrial Relations, held at the ILO, Geneva, from 23 to 24 November 2010. The purpose of the Forum was to examine developments in the hotels, catering and tourism (HCT) sector and their impact on the employment, decent work, skills development, vocational training, HRD, labour-management relations and working conditions. The Forum has based its points of consensus on the Decent Work Agenda, the ILO Declaration on Fundamental Principles and Rights at Work (1998), the Declaration on Social Justice for a Fair Globalization (2008) and the Global Jobs Pact (2009). The Forum developed consensus on the following:

Point 1: The impact of the economic crisis on the hotels, catering and tourism sector

1. Hospitality and tourism – one of the largest and most dynamic industries in today’s global economy – has shown some resilience compared to other sectors since the economic and financial crisis, after several years of consecutive growth up to mid-2008. The HCT industry, in common with the wider global economy, has faced major challenges over the past two years, and the impact of the crisis has been variable, with some regions performing far better than others. The crisis has led to changes in work practices in the sector. Social dialogue is a key to accommodating such changes while reconciling the interests of enterprises, their workers and their customers.

Point 2: Ways towards recovery – Recent trends and developments in the sector

2. There have been some encouraging indicators of increased tourist arrivals in 2010, but trends elsewhere in the global economy suggest that it may take some years for sustained recovery to be experienced in all regions. The crisis could be taken as an opportunity for the hospitality and tourism sector to increase its social dialogue, skills development and indirectly facilitate economic recovery. Engagement from governments, employers and workers and their representatives¹ is required to ensure effective vocational education and training provision that is properly aligned with the skills needs of the sector. This is especially important because the G20 Summit in November 2010 (Seoul) recognized that creating quality jobs must be at the heart of global economic recovery, acknowledged the

¹ Throughout this text when the term “workers’ representatives” is used, it refers to *Article 3* of the Workers’ Representatives Convention, 1971 (No. 135), which reads as follows:

For the purpose of this Convention the term “workers’ representatives” means persons who are recognized as such under national law or practice, whether they are: (a) trade union representatives, namely, representatives designated or elected by trade unions or by the members of such unions; or (b) elected representatives, namely, representatives who are freely elected by the workers of the undertaking in accordance with provisions of national laws or regulations or of collective agreements and whose functions do not include activities which are recognized as the exclusive prerogative of trade unions in the country concerned.

importance of private sector-led growth and stressed that development should be centred on investment, jobs and social protection.

Point 3: New ownership patterns and their impact on employment, industrial relations, HRD and qualification needs

3. The environment within which HCT businesses operate continues to change with respect to demographics, ownership, management structure, technology and approaches to the natural and social environment. Ownership trends in recent years indicate that a growing proportion of the industry operates through franchising, leasing or management contracts rather than direct ownership. There has also been increased involvement of private equity firms and real estate investment trusts in the industry. Large hotel chains have tended to refocus on specific elements of their core business, while shifting other parts of the business to outside service providers or working entirely through franchises, thus having less direct involvement with HRD issues than before. Such firms' corporate social responsibility (CSR) policies should be fully reflected throughout operations under their brand name, respecting the principles of the ILO's tripartite Declaration of Principles concerning Multinational Enterprises and Social Policy (MNE Declaration) and the OECD Guidelines for Multinational Enterprises and in accordance with national law and practices.

Point 4: Diversification of accommodation, operations and consumption and their impact on employment, industrial relations, HRD and qualification needs

4. The diversification of accommodation formats and of alternative tourism products, such as sports, medical and wellness tourism, boutique hotels, apartments let on a temporary basis, sustainable tourism packages and other formats, have had a variable impact on jobs, social dialogue, HRD and skills. In this context of diversification:
 - Diversification should be acknowledged as a means of increasing the growth of the industry and of reducing the effects of seasonal variations, thus promoting the sustainability of enterprises and jobs.
 - Governments should include – in the concept of accommodation and catering facilities – the various forms of services which respond to diversification of demand.
 - In global studies on tourism, accommodation and catering, the ILO and the UNWTO should carry out deeper regional analysis, in consultation with governments and representatives of workers and employers from the hospitality and tourism industry, including on the development of SMEs.
 - Governments should promote a legal framework for labour issues in tourist accommodation and hospitality that guarantees uniform practice of decent and productive work, adapted to the supply and demand characteristics of the facilities included in the concept of hospitality and catering, in conformity with the situation in each country.
5. There has also been significant growth in tourist numbers in emerging markets. Workforce trends and ageing populations require progressive workforce development strategies, enhancing the skills, motivation and working conditions of existing employees. The future HCT workforce will have greater diversity of gender, ethnic background and age profile.

To be effective, approaches to skills development for the sector should be part of long-term national growth strategies so that skills development, the industry's HR needs and overall national labour market policies are linked. Vocational training needs should be identified through social dialogue at national, local and enterprise level. There is a need to promote skills development, improved working conditions and stable labour relations to enable the industry to continue its sustainable growth for the benefit of employers, workers and society as a whole – especially for those people who depend on the industry or on its extensive supply chains.

6. The success of the HCT sector depends heavily on its quality of service, which in addition to the technical and occupational skills of its staff, also relies on soft skills including language and communication skills, courtesy, ethics, friendliness, good behaviour, discipline, conscientiousness, self-confidence, adaptability, creativity and punctuality. Some of these skills can be enhanced through training.

Point 5: Strategies to promote decent work and sustainable tourism through social dialogue

7. The HCT industry is projected to grow significantly over the coming years, including through the development of sustainable tourism. Government, Employer and Worker representatives should consider the decent work opportunities that the sector's new orientation offers and the workplace challenges that it faces. Effective social dialogue – including collective bargaining – tailored to the realities of the HCT industry, can enhance labour-management relations and thus the operational environment of the sector and its potential for employment growth; address changing demographic profiles within the workplace; and promote sustainable tourism, skills development and decent work. There may be a need to explore alternative approaches to the enhancement of labour relations and decent work which take better account of the structural and geographical diversity within HCT, the importance of promoting equal opportunities and treatment for women in the workforce, and the central role of SMEs within the sector.
8. For many young women and men, the HCT sector remains a major entry point into employment. The employment of a particularly large number of women in the sector in most countries can significantly contribute to the achievement of equal opportunity policies and contribute towards reaching MDG targets on gender. It is especially important that the sector's ability to continue to generate employment for women be supported as part of overall socio-economic development strategy.
9. Good standards of HR practice can be combined with sustainability initiatives to promote decent work. Public-private partnerships are often crucial to tourism development, and social dialogue could encourage more effective coordination of such development to maximize benefits for customers, employers, workers and society as a whole.
10. Changing consumer expectations and behaviour towards ecological issues give the sector the opportunity to improve its image and its performance in terms of consumption levels, efficiency, and environmental impact. The HCT industry and its enterprises are considered to be crucial actors of social development and poverty reduction in many countries. Through sustainable tourism, innovation and the creation of competitive advantage, companies and destinations can change their approaches to operations and to the employment environment within the sector. Environmentally sustainable development is a collective responsibility of all industry stakeholders and there are excellent prospects for consultation and sharing ideas among them. This is especially important in the case of major global sporting and similar events, which could benefit greatly from social dialogue in a way that would support stable and decent work in hotel, catering and tourism facilities developed for such mega events.

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11. Labour migration is a growing phenomenon around the world, providing a pool of workers for sectors such as hospitality and tourism in many countries. However, where migrant workers have little or no education or training, they may face a heightened risk of exploitation. The potential for “win-win-win” solutions exists, whereby the sending and receiving countries and the individual migrant can all benefit. The ILO’s Multilateral Framework on Labour Migration – non-binding principles and guidelines for a rights-based approach to labour migration – can assist governments, social partners and stakeholders in their efforts to regulate labour migration and protect migrant workers. It is essential to have equity in the treatment of migrant workers in the context of managing new developments and challenges in the HCT sector, especially in time of crisis.
 12. The values embodied in the ILO Declaration on Fundamental Principles and Rights at Work and its Follow-up of 1998 should be promoted to advance social dialogue in the HCT sector. These principles should be upheld by all the parties concerned, irrespective of the format of the HCT operator, the form of ownership, the size of the company (especially SMEs) or the employment relationship between worker and employer. The application and implementation of these principles and rights would assist in promoting and sustaining decent work in the HCT sector. Low-cost formats can be a legitimate competitive advantage for some operators and countries, but national law and the core international labour standards embodied in the 1998 ILO Declaration on Fundamental Principles and Rights at Work should apply to all to ensure a minimum floor for conditions of employment and decent work.
 13. The Forum recognizes the central role of governments in the facilitation and marketing of tourism, through ensuring an enabling environment, the required infrastructure provision and effective destination marketing. Governments also play a central role in areas such as investment, labour law, occupational safety and health, skills certification, security, sanitation and transport infrastructure, which are critical to the development and sustainability of the industry. They should ensure that the legal framework and their enforcement mechanisms promote adherence to decent work standards throughout the sector, and that all formats of accommodation are treated equitably as regards compliance with applicable labour, safety, commercial and taxation law and regulations.
 14. Effective social dialogue, alongside well-managed enterprise-based employee training, performance management systems and skills certification, can enable the development process for workers at all levels to operate in a way that better meets the needs of employers and individual workers. It is important that workers’ views are taken on board on issues that fundamentally affect their interests, including those relating to training, skills development and certification, and performance management systems.

Point 6: Suggestions for future ILO action

15. The ILO, in close cooperation with the UNWTO, the OECD and other organizations, can assist all parties involved in hospitality and tourism (governments, employers and workers) to address sufficiently the sustainable development of the sector. To this end, the ILO should:
 - in consultation with concerned authorities, collect statistics, compile information on best practices, monitor and analyse trends in employment, working conditions, wages, business activities and ownership in the sector, at the regional as well as the global levels, and especially on small and medium-sized enterprises, and include reference to this research in work relating to the sector’s contribution to the Global Jobs Pact and recovery from the economic crisis;

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- promote the ratification/implementation of the Working Conditions (Hotels and Restaurants) Convention, 1991 (No. 172);
 - provide technical support, including through capacity building, to member States and social partners to promote poverty reduction through tourism and development of sustainable tourism, within the framework of the Decent Work Agenda, and continue its cooperation with other UN agencies such as the UNWTO;
 - undertake research on: gender issues within HCT industries in different countries and regions; the role of tourism-related foreign direct investment and its impact on wider employment; CSR issues; the role of international framework agreements in the HCT sector; the nature of employment relationships in different parts of the sector; and the likely long-term impact of demographic, attitudinal and behavioural change on employment, corporate practices and CSR;
 - organize activities to assist constituents in the HCT sector to ensure that training is closely aligned to the needs of the industry and its workforce and to support the development and/or improvement of labour–management relations at all levels, including through the organization of national or regional workshops on decent work and sustainable tourism through social dialogue in the HCT sector in future programmes and budgets.

Evaluation questionnaire

A questionnaire seeking participants' opinions on various aspects of the Forum was distributed before its last sitting. The following is an analysis of their responses.

1. How do you rate the forum as regards the following?

| | 5 | 4 | 3 | 2 | 1 | |
|--|-----------|------|--------------|------|----------------|---------|
| | Excellent | Good | Satisfactory | Poor | Unsatisfactory | Average |
| The choice of agenda item (the subject of the forum) | 6 | 16 | 2 | – | – | 4.17 |
| The points for discussion | 4 | 13 | 7 | – | – | 3.88 |
| The quality of the discussion | 1 | 9 | 10 | 3 | 1 | 3.25 |
| The forum's benefits to the sector | 1 | 14 | 5 | 4 | – | 3.50 |
| The points of consensus | 1 | 7 | 7 | 2 | 1 | 3.28 |
| Opportunity for networking | 6 | 9 | 5 | 2 | – | 3.86 |

2. How do you rate the quality of the *Issues paper* in terms of the following?

| | 5 | 4 | 3 | 2 | 1 | |
|-------------------------------------|-----------|------|--------------|------|----------------|---------|
| | Excellent | Good | Satisfactory | Poor | Unsatisfactory | Average |
| Quality of analysis | 3 | 17 | 4 | – | – | 3.96 |
| Objectivity | 2 | 12 | 10 | – | – | 3.67 |
| Comprehensiveness of coverage | 3 | 13 | 5 | 2 | 1 | 3.63 |
| Presentation and readability | 6 | 15 | 3 | – | – | 4.13 |
| Amount and relevance of information | 4 | 13 | 7 | – | – | 3.88 |

3. How do you consider the time allotted for discussion?

| | Too much | Enough | Too little |
|--------------------------|----------|--------|------------|
| Discussion of the report | – | 14 | 10 |
| Presentations | 3 | 9 | 12 |
| Group meetings | 1 | 12 | 11 |

4. How do you rate the practical and administrative arrangements (secretariat, document services, translation and interpretation)?

| 5 | 4 | 3 | 2 | 1 | |
|-----------|------|--------------|------|----------------|---------|
| Excellent | Good | Satisfactory | Poor | Unsatisfactory | Average |
| 7 | 15 | 2 | – | – | 4.21 |

5. Respondents to the questionnaire

| Government | Employers | Workers | Total | Response rate |
|------------|-----------|---------|-------|---------------|
| 9 | 12 | 3 | 24 | 21.05% |

6. Participants at the Workshop (including advisers)

| Government | Employers | Workers | IGOs/NGOs | Others | Total |
|------------|-----------|---------|-----------|--------|-------|
| 39 | 20 | 32 | 15 | 6 | 112 |

7. Female participation

| Government | Employers | Workers | IGOs/NGOs | Others | Total |
|------------|-----------|---------|-----------|--------|--------|
| 8 | 4 | 8 | 10 | 4 | 34 |
| 20.51% | 20% | 25% | 66.67% | 66.67% | 30.36% |

List of participants
Liste des participants
Lista de participantes

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Président/modérateur
Presidente/moderador

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