



Hospitality Europe Business News – Issue 18 – 21 May 2019

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INDUSTRY INTERVIEWS

Interview with Mr. Timo Lappi, CEO of the Finnish Hospitality Association



Timo Lappi holds a Master of Law, taken in the University of Turku Finland. His career experience included several years as a Legal Counsel of the Finnish Bankers Association, as well as Head of the Legal Department of the Central Chamber of Commerce. After that, Mr. Lappi became CEO of the Direct Marketing Association (2001-2003). Since 2003, Mr. Lappi is CEO of the Finnish Hospitality Association.

Timo Lappi holds a Master of Law, taken in the University of Turku/Finland. His career experience included several years as a Legal Counsel of the Finnish Bankers Association, as well as Head of the Legal Department of the Central Chamber of Commerce. After that, Mr. Lappi became CEO of the Direct Marketing Association (2001-2003). Since 2003, Mr. Lappi is CEO of the Finnish Hospitality Association.

1. Finland will hold the Presidency of the Council of the EU from 1st July 2019 onwards, during six months. What are the main priorities for the Finnish Hospitality Association (FHA) in the months ahead?

We had the Parliamentary elections 14th, April 2019. We have lobbied very actively all the major parties in Finland since last autumn. Concerning EU legislation our main message to Finnish politicians has been *cut the red tape*. Although every EU commission has had in its program a goal to reduce the burden of legislation, the result has been opposite. Our SMEs cannot bear the burden of all the time growing legislation.

2. Can you share with us some best practices developed by your association, that you think could make a difference in the hospitality sector across Europe?

We have been very active in fighting against black economy in restaurant business over 20 years. The size of black restaurant market in Finland is relatively small compared to many other European countries. That has made it possible to have a success with fair play restaurants. In order to achieve our goal we for example don't accept a company as our member if it hasn't paid taxes according to our legislation. Fighting against black economy has raised the respect of restaurant business and our association even among authorities and politicians.

3. Can you describe the drivers of the success of your Association? And what are the main challenges?

We have lots of members, about 10 – 90 percent of turnover in hospitality business in Finland. Of course, especially the bigger members appreciate our lobbying power. But overwhelmingly biggest part of our members are members because of our legal services. We have 7 labor law lawyers and 5 business law lawyers. They receive about 14 000 contacts from our members every year. Over 95 percent of advice is included in membership fee. We offer also services, which our members have to pay, but the price of services are much smaller than attorneys. We have invested a lot to friendly and easy accessible service.

The main challenges are the poor profitability of our member companies and the lack of skilled work force. Both the challenges are very difficult to tackle.



Interview with Mr. Peter Thomelius, Head of Education and HR department, at VISITA/Sweden



Peter Thomelius was former head of a secondary school in Sweden. Later on, he became a member of the Board of R&D Fund of the Swedish Tourism & Hospitality Industry and of the industry training board. Since 2011, Mr. Thomelius holds the position of Head of the Education and HR Department, at VISITA/Sweden.

He is also board member of the National Delegation for Validation 2015–2019 and was appointed by the Swedish Government to follow-up, support and promote coordinated development work in the area of validation and to propose a national strategy for validation.

1. In 2018 VISITA and its trade union counter-part HRF commissioned a study to Kairos Future to investigate the automation's impact on future skills needs in the hotel and restaurant sector. Can you share with us the main conclusions of the study?

The sector is growing, it is becoming diversified into increasingly separate and specialised parts, and automation will play a major role in the sector's future needs for skills and expertise.

Traditional jobs within the sector are expected to decline. Kairos Future estimates that it is reasonable to assume that between 25% and 40% of the traditional jobs will be automated by 2030. How fast and to what degree the automation will have impacts depends upon the incentives, such as costs for employees, anticipated productivity gains, and the costs for the automation itself, but also pure quality gains with automation such as higher levels of service.

The hotel and restaurant sector in Sweden currently have a yearly turnover of 25 % of its staff. Recruiting competences is a greater challenge than that posed by the predicted growth in automation. The competition for competent and skilled employees is fierce, both between industries and among companies within the same sector. Finding, developing, and maintaining expertise will become the central issue over the next 10 years.

2. In a world where robots will be replacing many tasks developed today by the human beings, do you see any risks for the workforce in the hospitality sector? Will the "human touch" ever be at risk in the hospitality sector?

Roles and tasks related to creativity, perception, motor skills, and social skills are difficult to automate and are likely to increase in value. Complex tasks like solving unexpected problems, reading and responding to moods and situations, creating new menus, helping and educating guests, are difficult to automate. While these are likely to still be important roles for people in 2030, the industry as a whole will also need new types of services such as SaaS (Software as a Service) or RaaS (Robot as a Service) delivered by actors outside the hospitality industry.

3. Do you have a recommendation to provide to HOTREC members in terms of education and training to employees in the hospitality sector, taking into account the conclusions of the study?

Training at all levels must be better adapted to new opportunities and challenges. Industry slippages are occurring right now, therefore the capacity of development and adaption will be much needed. The educational system needs to be re-designed with a more flexible, open and clear structure.

All analyses indicate that individuals with low education and youth will generally be harder hit by developments in automation. This implies that education must, to a greater extent than today, and especially in the upper secondary schools, teach new skills and offer internships. This also means that education at higher levels can be expected to be increasingly demanded by companies in the hotel and restaurant sector.



Interview with Mr. Pierre Verdier, Commercial Director at Deliveroo France



Pierre Verdier is Commercial Director at Deliveroo France where he and his team are in charge of developing strong relationships with the 10.000 restaurant partners all across the country.

Before participating in the launch of Deliveroo almost 5 years ago, Pierre, who studied at Edith Cowan University and holds an MIB from Kedge Business School, was Sales Director at Groupon and in charge of the Pre-paid Services Business Development at Edenred.

Pierre is married and has 2 kids, with whom he loves to share a Thai Curry delivered at home in Paris on a Sunday evening.

1. The delivery market and take away are both developing swiftly and revolutionizing the food market. How do you explain this success and what is the unique selling point of Deliveroo if any as of today compared to its competitors?

Food delivery and take away are popular because they are convenient and answer exactly to what people are looking for when they are hungry: having access to a wide range of food options from their favorite restaurants and being able to enjoy it when they want. At Deliveroo we want to offer the best price, selection and service to consumers, while also improving our offer to restaurants and riders. People want to be able to choose amazing food whenever and wherever it suits them - and that's exactly what Deliveroo will continue to offer.

Everything we have done is about offering the best possible food experience. We have excellent relationships with our partner restaurants we work with and for whom we are developing innovating concepts and new tools help restaurants to improve their delivery offerings and increase their revenue, for example offering unique data insights or helping restaurants to develop new brands and concepts. Deliveroo has always been the leading innovator in the food sector. By end 2019, Deliveroo will work with over 5,000 restaurants across Europe.

Also Deliveroo offers well-paid flexible work that is increasingly popular as people seek to fit work around their lives, not the other way around. In 2019 Deliveroo will work with 170,000 riders across Europe, demonstrating how popular the work Deliveroo offers really is.

Finally, Deliveroo has always been close to its clients and is set to introduce a more personalised service for consumers, so their experience is tailored to their tastes and habits. We will show users restaurants based on the restaurants a customer has previously ordered from, as well as restaurants they are likely to order from based on previous behaviour and preferences of similar customer profiles.

Again, all this would not be feasible without the very good relationship we have with our partner restaurants and the amazing food that comes out of their kitchens.

2. Deliveroo has deliberately chosen to target Europe for now and quite intensively France. Why, how and with which next steps?

Deliveroo is at heart a European company. We were born in Europe - founded in London more than 6 years ago. 8 of our 14 markets are in Europe and we have thousands of European staff in our tech team at our HQ in London. Yes, Europe will be critical to our future success and we will remain locally present there where we are doing business with local teams in the city and regions we operate in. Regarding France, this is of course the country of gastronomy, of fine cuisine, but also the country where people are adopting quickly new technologies and are eager to discover new trends. Therefore, the scale of the opportunity in France is huge and we are investing heavily in the country with the intention to expand further. We were not at all surprised that since our launch in Paris restaurants, consumers and riders were so excited about working together.

3. In this start-up market so to say, how do you see the food market in 5 and 10 years (split in take away, delivery and on site) and which role may play restaurants, bars and cafes?

In about 5 and 10 years, we are assured that Deliveroo will more than ever be the definitive food company. Where we had set out to create the best food delivery experience in the world, we now see the opportunity to become the definitive food company. That means a company that thinks about more than just delivery, but about all aspects of the food sector and how we can improve this.

In the same way as when you think about searching the internet you think about Google, or when you think about new music you think about Spotify, when you think about food we want you to think about Deliveroo.

Convenience will remain key in the hospitality sector. Customers will be closely looking at what are the new food trends and where they will be able to experience unique propositions.

These trends will come from all actors in the sector. As a delivery company, we do believe that delivery is part of maximising convenience and it won't be confined to restaurants, new concepts will emerge. Deliveroo has led the way with its partners with the Editions concepts: delivery only kitchens in poor supply areas to offer more selection to customers. Other formats will emerge like Virtual Brands where restaurants deliver another cuisine type from the same kitchen. This follows what the customer wants: more choice and new experiences

Food delivery is still in a pick up phase and growing more everyday, we are confident that - while working together with us - the on site business will keep on growing because that's what characterises us Europeans: enjoying sharing delicious food and drinks with beloved ones in restaurants, bars and cafés.

Interview with Mr. Stéphane Ficaja, Regional General Manager - Uber Eats Western & Southern Europe



Stéphane Ficaja is the Regional General Manager at Uber Eats Western & Southern Europe since April 2019. He joined Uber Eats in 2016, as a General Manager of Uber Eats Belgium & France Expansion and two years later he continued as General Manager of Uber Eats France, Belgium & Switzerland.

As a past career experience, Stéphane was also Head of Existing Supply at EMEA and Head of Partner Operations. Stéphane holds a Master degree in Computer science.

1. The delivery market and take away are both developing swiftly and revolutionizing the food market. How do you explain this success and how UBER Eats envisions to become the market Leader and when?

While food delivery and takeaway are not new markets in many parts of Europe, the huge increase in consumer demand for more convenient ways to eat has largely been driven by advancements in technology. Thanks to the logistics technology that unpins apps like Uber Eats, most restaurants can now offer their customers food delivery at the press of a button. The fact that tens of thousands more restaurants can now provide quick and reliable delivery is the key driver of consumer demand. For example, we know the more selection we offer users, the more they use our app. This drives incremental sales for restaurants by unlocking new use cases (e.g. lunch at work post-workout smoothie) which increases order volume and order frequency.

Although the food delivery market is incredibly competitive in Europe, at Uber Eats we believe our success is being driven by the strong relationship we've built with the restaurant industry. While of course building technology that offers the best delivery experience is critical, ultimately consumers use our app over competitors because we have more of their favourite restaurants than anyone else.

If we want to maintain this competitive advantage, we know we must continue to build a hand in glove relationship with the restaurant industry, based on trust and mutually beneficial results. That's why today we are laser focused on understanding how we can use our technology to help restaurants unlock the value of their business with food delivery, and in turn offer our users the best selection in the market.

2. UBER Eats is by nature global with only a few competitors per continent. Is there a UBER savoir-faire or model, and how do you intend to impose your business model?

One of the main benefits of being a global company is the ability to share best practice and insights with our customers around the world. Whether that's by working with global partners like McDonald's to help seamlessly integrate delivery into its core business via PoS integrations or helping small business owners around the world access data and insights to get a more informed view of their business and the opportunities available to grow.

This can include simple things like understanding demand patterns to more efficiently manage overhead costs like staff and stock, all the way to using industry trends and macro demand and supply analysis to unlock entirely new business opportunities.

In fact one of the most successful concepts we've exported around the world is helping existing restaurants increase the utilisation of their real estate by launching a virtual restaurant on the Uber Eats app. In a nutshell, a 'virtual restaurant' is a restaurant that only exists in the digital world. There is no physical storefront, no front of house, and you can only access the restaurant via a virtual storefront on an app or website.

The great thing about virtual restaurants is there are very small startup or expansion costs for existing restaurants, which can test and experiment with the menu incredibly easily, with the feedback tools to continuously optimise the product-market fit.

This is a win win for restaurants and consumers. For a minimal incremental cost our restaurants partners can offer multiple menus and cuisines from the same real estate, maximising revenue opportunities and making their operations more efficient. At the same time, consumers get to enjoy more selection and food options in their local area.

3. In this start-up market so to say, how do you see the food market in 5 and 10 years (split in take away, delivery and on site) and which role may play restaurants, bars and cafes?

While food delivery has seen exponential growth over the past few years, it still accounts for a small fraction of the total foodservice market. In fact, according to a recent report by MCA food delivery represents around % of sales in the market. This demonstrates we're only scratching the surface of the potential market, and the opportunity for restaurants to optimise and grow their business using food delivery is huge.

To put this into context, at Uber Eats we think about two distinct eating occasions - practical and experiential. Practical eating is what we do everyday whether at home, work or on the road, while experiential is more about enjoying a meal at a restaurant with friends, family and loved ones. We eat practically around 75% of the time and experiential for the remaining 25%. Right now food delivery accounts for approximately 1.5 out of 21 weekly meal occasions, largely to make practical eating more convenient.

Over the next 5-10 years we expect more people to use apps like Uber Eats to order from restaurants to satisfy their practical eating needs, presenting a huge growth opportunity for the industry. However, we have a lot of work to do in order to make food delivery an everyday possibility for more people. For example, food delivery is still relatively expensive for most people. How can we partner with the restaurant industry to bring down the cost of food production with technology enabled operational efficiencies. Likewise, although the selection of meals on offer has increased significantly, there are many selection gaps in the market. We need to work with restaurants to provide data and insights to plug these selection gaps with new cuisines and meal options.

Mostly we are excited about going on this journey in partnership with the industry. We have a long way to go to make food delivery part of people's everyday eating habits, but together we strongly believe food delivery will benefit everyone in the market. From helping more people eat well everyday to providing restaurants with a long term and sustainable growth lever.

DIGITAL ISSUES

IHA-D brings Booking.com's contracts with a German hotel under European Court of Justice's review



Source: www.wikingerhof.de

With the support of the German Hotel Association (IHA-D) contract clauses between Booking.com and a German hotel near the German-Danish border will come before judges at the EU's highest court in a dispute over whether the online platform is abusing its market power.

In a case pending since the year 2015 Germany's Supreme Court has now asked the EU Court of Justice how to review clauses that determine where litigation should take place when one of the contracting parties is accused of dominance abuse.

The 69 room Hotel Wikingerhof (www.wikingerhof.de) in the municipality of Kropp (state Schleswig-Holstein) has been pursuing with full support of IHA-D a lawsuit against Booking.com for anticompetitive terms in the contract. The hotel argues that Booking.com's imposes abusive terms due to high commission rates; the refusal to share customer data with the hotel; and offering discounts without the hotel's consent. These antitrust allegations differ from Booking.com's other litigation and regulatory scrutiny, which has focused on "best price clauses".

Wikingerhof has already seen its dominance-abuse lawsuit against Booking.com thrown out twice by lower German courts that ruled they had no jurisdiction to review the claim. This was because jurisdiction rules and contract clauses meant the lawsuit should be filed against Booking.com in its home nation, the Netherlands.

We took the case to Germany's Supreme Court, which on 29 January 2019 sent the case to the EU's top court, asking questions about European laws on jurisdiction.

The two sides disagree on whether the allegedly anticompetitive conduct was covered by a clause in their contract. If it is covered, the dispute should be heard in the Netherlands, according to the contract. IHA-D and Wikingerhof argue that unfair pricing falls in any case outside of Booking.com's general terms & conditions.

The Court of Justice in Luxembourg is being asked how to consider such jurisdictional clauses (Article 7, paragraph 2 of Regulation 1215/2012) when the company is accused of abusing its market power. The case reference is C-59/19.



HRS and IHA-D reach agreement on best price clauses



Source: HRS head quarter in Cologne;

Raimond Spekking - Wikimedia Commons CC-BY-SA 4.0

Settlement allows German Hotel Association (IHA-D) and HRS to look ahead together

+++ Equal treatment of all booking portals still open

HRS and IHA-D reached on 30 April an agreement on an out-of-court solution to the issue of "damages for best price clauses": HRS will pay a one-off amount of 4 million euros to the association. IHA-D will use this amount to compensate the approximately 600 hotels that merged in the previous year in order to assert claims for damages.

The agreement marks the end of a long and arduous process that began at the end of 2013 with the Bundeskartellamt's order for a ban of rate parity clauses, which has become legally binding since then. At the end of 2017, IHA-D called on its members to participate in a class action for damage compensation against HRS. At the same time, an industry-wide solution, which also includes Booking.com and Expedia in Germany, has yet to be found.

After intensive discussions, HRS and IHA agreed that an end to this issue and a look ahead is the best option for both parties. The hotel industry is faced with many challenges that need to be solved together. The agreement creates the conditions for HRS and IHA-D to work together constructively on solutions for the hotel industry in Germany in the future. Despite the settlement, both sides are sticking to their original legal positions.

HRS Managing Director Tobias Ragge is satisfied: "It is good to draw a line under this chapter, even if we are at the core of different legal views. As a long-term partner of the hotel industry, we want to work together on the future instead of investing resources in a topic from the past".

IHA-D Chairman Otto Lindner also views the agreement with HRS positively: "The out-of-court settlement with HRS is the result of many years of our association's work and a milestone for the hotel industry in Germany. At least in connection with HRS, the issue is now over for us. We will insist that the same standards are finally created for all other market participants as well."

Both sides have agreed not to disclose the details of the agreement. The hotel association will inform the approximately 100 affected hotels individually about the next steps in the coming weeks.



Study on “The impact of the digital transformation on EU Labour markets”



On April 2019, the study on ‘The impact of the digital transformation on EU Labour markets’ developed by a high-level group comprising representatives from academia, civil society, as well as industry and commissioned by the European Commission was published. Digital transformation, including artificial intelligence and automation is having an impact on the way we live and work in Europe.

But the benefits brought by such changes are accompanied by certain challenges. Experts recommended the following:

- **A skilled workforce – ready to contribute to tomorrow's world of work:**
 - Enabling digital skills personal learning accounts, allows workers to acquire relevant skills throughout their careers in order to stay relevant in rapidly transforming, digital labour markets;
 - Scaling up career counselling and creating innovative learning environments to enable better career choices and active pursuit of relevant training for all Europeans;
 - Supporting labour market intermediaries (e.g. temporary agencies) to reduce structural skill gaps workers at risk of automation and the low-skilled.
- **New labour relations – adapting structures to today's realities:**
 - Preventing occupational safety and health risks like mental health and stress related issues resulting from digitalization;
 - Reinvigorating social dialogue.
- **A new social contract – upgrading the social fabric of our labour markets:**
 - Ensuring neutral social protection against unemployment, sickness and other life circumstances independent of employment status;
 - Creating a Digital Single Window for employment contributions and taxes for self-employed working on online platforms for multiple and rapidly changing employers;
 - Redistributing the value of digital ownership, e.g. through treating data as either capital, labour or intellectual property.

How to organize hotel and restaurant websites?



According to Nick Papa, senior Copywriter at HEBS Digital, the six basic rules to build a tidy hotel's website content, pass through the following:

- Commit to tide up: often hotels with too many pages generate no revenue for the property. Check if your single-property website has more than 40 pages, or if your multi-property website has more than 30 pages per property. If your website is over these recommended page counts, commit yourself to improving your website content. Before you refresh your existing content, make sure you consolidate similar or duplicate content and discard unnecessary landing pages.
- Ask yourself what matters most to your target audience? Is it the convenience of your on-site amenities and facilities Or proximity to things to do in the destination The deeper they have to click into your site to find it, the higher your bounce and exit rates will be. Tips include:
 - o Update hero images with seasonal photography and marketing messages
 - o Use promo titles on the homepage to point to important areas of the website
 - o Activate content personalization to target audiences with custom marketing messages
 - o Refresh your calendar of events throughout the year with key events happening on the property and in your destination
 - o Publish regular blog posts about the best things to do in your destination
- Tide by category, not location: by focusing on a single category across all your properties, you can ensure consistency in style and content from location to location;
- Think smart: business needs; discoverability; content; target keywords; miscellaneous
- Ask yourself if it inspires joy: analyse whether you offer content personalization (speak to new and returning visitors); prepare special offers and packages; present unique destination area guides...
- If you follow all ingredients, you will have more chances of attracting more guests.

EDUCATION & TRAINING

Malta Business Bureau reaches out to Stakeholders in Brussels to promote a Digital Literacy Toolbox



Source: Ray Attard, Audio Visual officer at Permanent Representation of Malta to the European Union

On Monday 15th April, the Malta Business Bureau held an Information Demo Seminar at the Permanent Representation Office of Malta to the European Union in Brussels.

During this event, European stakeholders (including HOTREC) were provided with an overview of the work that has been carried out over the last months as part of the ITA project, and were given the opportunity to

test some of the case-studies that have been developed by the partners and incorporated in the ITA Digital Literacy toolbox.

As digitisation penetrates more aspects of our daily life, from tasks at home to tasks at work, the demand for EU citizens to obtain digital skills is fast increasing. In 2016, the EU's Digital Skills and Job Coalition reported that a staggering 45% of EU citizens are still considered to be digitally illiterate. This is why the Malta Business Bureau, the EU advisory office of the Malta Hotels and Restaurants Association, opted to join a consortium consisting of partners from Malta, Romania, Greece and the Czech Republic to implement the VITA Project (2017-1-MT01-KA204-026949). VITA's core aim is to develop a novel toolbox by which trainers can attract, reach out and assist learners in improving their digital literacy.

Virtual and Augmented Reality (AR) Technology facilitates much of the learning promoted by the ITA project. Through the ITA Toolbox, trainers are not only equipped with essential theoretical material in the form of Modules (below), but also provided with a good number of AR case-studies that apply theory to practice and facilitate the learners' understanding.

- Module 0: An Introduction to the ITA Trainers' Course;
- Module 1: An Introduction to Digital User Interfaces;
- Module 2: Basic Communication in Digital Environments;
- Module 3: Creating, Handling and Storing Basic Digital Content;
- Module 4: An Introduction to Virtual and Augmented Reality.

The use of digital technology in education has become a key priority on the European agenda. This is reflected in a 2016 Research Report conducted by Vera Hutchinson from University College London's Institute of Education, emphasising how such technology can personalise learning, offering both adults and young people more control over their learning processes. MECB Ltd. (Malta) is the ITA project's lead partner, with the Malta Business Bureau (MBB - Malta), CAMIS Centre at the University Politehnica of Bucharest (Romania), Drosostalida Social Enterprise (Greece) and RPIC- IP (Czech Republic) making up the rest of the consortium.

The project was launched in October 2017 and will end in October 2019. For more information regarding the Erasmus ITA project, please visit www.mecb.com.mt/vita or contact MBB Senior Executive Marija Elena Borg on mborg@mbb.org.mt 35 21251719.

The Malta Business Bureau is the EU-business advisory office for the Malta Hotels and Restaurants Association and the Malta Chamber of Commerce, Enterprise and Industry.

François Hollande in the Hotel Management School of Paris



On April 1st, the Hotel Management School of Paris linked with GNI-Synhorcat, welcomed Mr. François Hollande, the former President of the French Republic. He stayed with young apprentices and answered all their questions about Europe: Brexit, migrants, legislation on Protected Designation of Origin, security...

For more information, please visit the website: [https://scontent.xx.fbcdn.net/v/t51.2885-15/54512394_394725567772073_3640924500304680255_n.jpg?](https://scontent.xx.fbcdn.net/v/t51.2885-15/54512394_394725567772073_3640924500304680255_n.jpg?nc_cat=101&nc_ht=scontent.xx&oh_ac=02bfb713301fa3f1e2ef4c9ab0e5D3E3F34)

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LOBBYING

Hotel associations from all over the world urge governments to reform global tourist short term rentals



Hotel associations have developed a proposal of global guidelines to be taken over by the different administrations of all cities over the world to reform tourist accommodation. The meeting brings together hotel associations from Barcelona, New York, Paris, Buenos Aires, London, Japan, Western Australia and Mexico City, among others, and representatives of the City Councils of Barcelona, Paris and Dubrovnik and, leaders of neighborhood associations.

On 30th April 2019, Barcelona Hotel Association has hosted the venue of the ReformBnB, an international meeting where the world's leading hotel associations have worked in a common front to provide fair rules to the short term rental industry. The meeting gathered representatives from more than 30 hotel associations from all over the world, responsible for the City Councils of Barcelona, Paris and Dubrovnik in the field of tourism and spokesmen for the association of neighbors of Barceloneta (Barcelona), one of the neighborhoods that has long been denouncing the serious problems that generate for residents these illegal accommodations. This meeting takes over from the summit promoted by the New York Hotel.

The sessions of the different ReformBnB Barcelona working groups have culminated with the elaboration of a proposal of global guidelines to be assumed by the different administrations over the world. This consensus document is structured around 7 guidelines: registration, taxation, limitations, safety and health, decision making by neighbors, liability and enforcement and control.

The first proposal calls for a registration system that is essential for authorities to know which properties are rented, who leases them and for how long. Cities such as Barcelona, Paris, Buenos Aires and Toronto and countries such as Colombia, Croatia, Greece, Sweden and Germany already apply this registration system, but the measure is intended to be extended to other cities. This first point also contemplates that platforms should be enforced to add the registration number in all listings.

The second measure focuses on taxation and claims that the same number of fees and taxes applied in hotels must be paid by the tourist accommodation industry. Compliance with tax regulations is a key factor for fair competition and would also make it more difficult for hosts to evade taxes. The consensual text also asks administrations to set thresholds to protect against negative social impacts. In this way, authorities would identify regular professional suppliers, which must comply with the same rules as hotels, hostels and other accommodations. It would allow for a healthy competition on the tourism market.

Safety and health are other highlights of the document. Short term rentals accommodations must comply with the applicable sectorial rules, which must ensure the provision of an optimal and safe service covering consumer rights and decreasing the problems with the coexistence with its environment. This legislation is already applied in Madrid.

These guidelines also give voice to the opinion of the neighbors in their building of the different tourist districts of the cities, who have to deal with the tourists. Neighbors should be able to choose who they want to live with and therefore, Short term rentals accommodations should not operate in their buildings without their consent.

Another measure, which has long been applied in Barcelona and Paris, puts on the table that the legal responsibilities of platforms and hosts need to be clearly defined. In this sense, landlords, online platforms and authorities must assume their responsibilities towards the client.

The final point calls on local authorities to regulate, to restrict or to cease practices that they consider illegal and to define penalties for those who break the rules and for platforms that do not respect the established regulations. A big challenge for cities around the world Tourist rental has increased over the past decade due to a poorly regulated environment. In this sense, the almost total absence of rules has led to the rapid growth of rental platforms, being Airbnb, in particular, the most developed platform within this regulatory chaos.

The meteoric growth of online marketing platforms, such as Airbnb, has had a very high social cost for citizens, damaging housing accessibility and, promoting the expulsion of neighbors from the most touristic neighborhoods of the cities and the loss of the essence of these.

It was announced that Buenos Aires will host the next Reformbnb summit at the end of October 2019.
For more information: Interprofit Montse Fernández Molas Albert Bisellach
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Hotel associations from all over the world urge governments to reform global tourist short term rentals

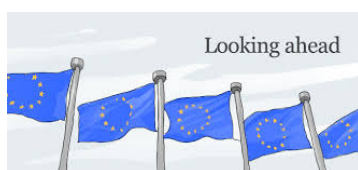


Since Friday, February 22nd 2019, UMIH and GNC have launched a large series of press conferences in all the territory in cooperation with the departmental federations. The purpose of this “Tour de France” is to alert local authorities about the importance for them to make good use of all legal tools available to regulate short term rentals.

UMIH and GNC’s elected representatives went in eight cities from now on among which Lyon, Toulouse, Nice and Biarritz. Three more press conferences are planned: La Rochelle (May 20th), Dijon (May 27th) and Bordeaux, (June 3rd) and others have to be planned. The last one will take place in Paris.



UMIH and GNC Manifesto ahead of EU elections



Considering the approaching European election, UMIH and GNC released a manifesto created in cooperation with the CAT (Tourism Actors Confederation) untitled: Destination Europe, let’s share our ambitions for a Europe of tourism.

This document presents figures related to global, European and French tourism. It also makes five proposals:

- Attractiveness and investments for the future: guiding investment policies according to the tourism industry’s stakes in order to favor employment, to develop local economies and encourage mobility in Europe;
- Digital economy: creating a strong Europe which leads to fairer rules and makes digital a development opportunity. As the GDPR, some initiatives (among which the PtoB Regulation) could have been significant actions taken by the EU;
- Employment: the EU is composed of 2 million companies from big ones to SME and of 12 million jobs. The tourism industry has a central role in social integration and professional development that must be promoted and fostered;
- Tax and competitiveness: the EU should focus on the competitiveness of companies to make the European market enticing. Companies should evolve in an unwavering tax environment. It is important to better regulate and introduce regulatory flexibility avoiding an imbalance regarding the digital platforms;
- Responsible development: sustainability is a top priority of this century. The EU has created tools and means that can be used to build the conditions for sustainable and persistent development for the benefit of current and future generations.



BUSINESS TREND & STUDIES

International tourist arrivals increased during 2018



International tourist arrivals (overnight visitors) worldwide increased 6% in 2018 to 1.4 billion, based on data reported by destinations around the world. Given the remarkable growth of international arrivals in recent years, the 1.4 billion mark has been reached two years ahead of UNWTO's long term forecast issued in 2010. 2018 consolidates the very strong results of 2017 (+7%) and is the second strongest year since 2010.

Middle East (+10%) and Africa (+7%) led growth, while arrivals to Asia and the Pacific and Europe (both +6%) increased in line with the world average. The Americas saw growth of 3%.

Overall, results were driven by a favourable economic environment and strong outbound demand from major source markets.

Among the world's top ten spenders, the Russian Federation (+16%), France (+10%) and Australia (+9%) reported the strongest increase in outbound expenditure in the first nine to eleven months of 2018. The United States (+7%) and the Republic of Korea (+6%) also recorded solid spending figures, all of them fuelling inbound growth in their respective regions and beyond.

Based on current trends, economic prospects and the UNWTO Confidence Index, UNWTO forecasts a growth of 3% to 4% in international tourist arrivals worldwide in 2019, more in line with the historical growth trends.

BUSINESS TREND & STUDIES

Hotel business growth: top industry trends to adopt!

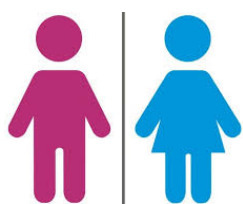


According with Nilam Oswal, from Insights, people around the globe are willing to travel more, both for business and leisure. This trend projects that the hospitality industry will witness positive growth in the future.

But businesses will need to face fierce competition. Ideas to keep your business competitive pass through the following:

- **Technological thinking:** hotel management software synchronizes various operations like sales, marketing, CRM, accounting, staff management, property management, inventory management. Cloud-based software can update information in real-time, automate tasks, boost collaboration among employees and much more. Moreover, installing appropriate software to facilitate payments and managing loyalty programs could be helpful. At the same time, installing help desk software allows you to address queries and problems promptly, thereby ensuring a smooth workflow;
- **Go mobile:** Over one-third of the hotel room bookings are happening on mobile devices and the figures are rising exponentially. This is the right time to develop a mobile-friendly website and a mobile app. Consider building a strong social media presence on media sharing apps and websites.
- **Adopt a localized and sustainable approach:** Travelers are keen to indulge in local experiences, tradition, culture, and food. As a hotel or restaurant operator, you can focus on these aspects. For example, include traditional food in your menu. You can also arrange a city tour, taking travellers to cultural hubs and the countryside. Also, use eco-friendly products and non-renewable energy resources;
- **Redefine your market strategy:** Everyone is marking their presence on social media platforms, whether it's Instagram, Facebook, Snapchat, Twitter, or any other platform. Therefore, optimize your hotel's social media accounts and invest in social media marketing to attract hotel bookings;
- **Customize offers:** You must be agile enough to curate packages for the clients. So if guests demand a chauffeur-driven car or ask for organic or vegan meals, you should definitely respond to their needs, as you will surely be winning some profit for the extra services;
- **Redefine your approach:** business trends keep on changing, so you must adapt new and old strategies to create a whole new redefined approach you guests.

Analysis shows hospitality gender pay gap is shrinking in the UK



Analysis by UKHospitality has highlighted that the sector continues to take great strides to tackle gender pay inequality and promote inclusivity. Gender pay gap figures released yesterday show that hospitality, out of 85 sectors, is the fifth closest to parity, with a gap of just 2.8%. Last year hospitality ranked 15th with a gap of 4%.

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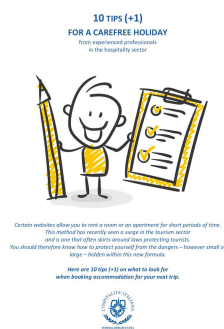
UKHospitality Chief Executive Kate Nicholls said: “The continued shrinking of the gender pay gap in the hospitality sector is incredibly positive news. It highlights the forward-thinking and inclusive attitude of our sector and the hard work employers have done to provide opportunities, irrespective of people’s gender. We are truly passionate about providing opportunities and meaningful career progression. The figures confirm our message that, within hospitality, there are no barriers to progression.

“To be the fifth closest to parity is excellent and I am sure that hospitality businesses will continue to build on this and shrink the gap even further. To move from 15th last year to fifth this year shows that we, as a sector, are not content to sit idle and are actively working hard to promote equality.



MARKETING & COMMUNICATION

10 tips (+1) for a carefree holiday



Federalberghi has developed a rulebook with 10 tips (+1) on what to look for when booking accommodation.

Websites allow tourists to rent a room (or an apartment) for short periods of time, a method which often skirts around laws protecting tourists.

Federalberghi wrote this paper with the aim of preventing unpleasant situations and explaining how to avoid the dangers – however small or large – hidden within this new formula.

The 10-point-handbook highlights some symptomatic situations of anomalies in the accommodation offer which could expose customers to numerous risks, suggesting alternative solutions.

The main problems are reviewed, including misleading announcements and “ghost” apartments, the lack of medical assistance and insurance against theft and injury, the inability to leave luggage in storage and to pay by credit or debit card, shortcomings in terms of hygiene and safety, the risk of fires, food poisoning and carbon monoxide.

For each of the detected critical points, the handbook provides practical advice, which helps the tourist to face the most complicated situations. This handbook, written in Italian and English, can be used by accommodation facilities as an information and communication tool for customers and to raise awareness on safety and legal issues.



SUSTAINABILITY

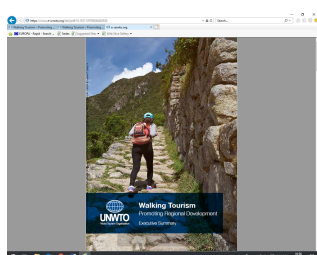
GNI promotes the French White Paper for sustainable gastronomy



The French Ministry of Foreign Affairs & Alain Ducasse together with 40 professionals proposed a new White Paper on sustainable gastronomy. This book explains the seven pillars of sustainable gastronomy: choice of ingredients, creation of menus, respect of biodiversity, management of food waste, awareness of entourage, fittings, and ethical collaborations. It gives testimonies and concrete good practices of restaurateurs. Click [here](#) to read the White Book (FR)



Analysis shows hospitality gender pay gap is shrinking in the UK



The World Tourism Organisation (UNTWO) has published in January 2019 the study: 'Walking Tourism – promoting regional development'. Walking tourism is now one of the most popular ways to experience a destination. It allows tourists to better engage with local people, nature and culture. It also meets the growing demand of travellers of outdoor activities in general, including when they travel.

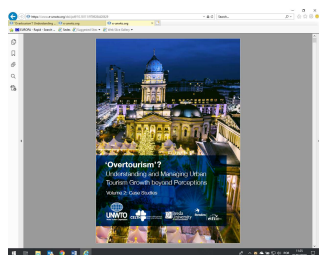
In addition, walking tourism can be developed anywhere as a sustainable tourism offer with a relatively small investment. It can bring about social and economic benefits to residents and communities if properly developed and managed. The report showcases various successful examples of walking tourism and aims to serve as a practical reference for destinations with a focus on the role of walking tourism in regional development.

It concludes by mentioning that for established destinations, it can be an additional tourism offer to make visitors explore less visited areas, spend more and stay longer. It can reduce the seasonality of tourist flows. But the benefits of walking tourism are not limited to tourism development. It also helps improve the quality of life for communities as it can be developed as community-based tourism products and support the local economy in rural areas. If managed properly, it can contribute to conservation of the natural and cultural environment and enhanced understanding of it among visitors and residents alike.

To have access and read the UNTWO study, please click [here](#).



UNWTO study on “Overtourism? - Understanding and Managing Urban Tourism Growth beyond Perceptions”



The UNWTO report on “Overtourism? – Understanding and Managing Urban Tourism Growth beyond Perceptions”, published in March 2019, examines how to manage tourism in urban destinations to the benefit of visitors and residents alike, showcasing strategies and measures to help better understand and manage visitor growth in cities.

The report includes several case studies across the world, but including – Amsterdam, Antwerp, Barcelona, Berlin, Cambridge, Dubrovnik, Edinburgh, Ghent, London, Lucerne, Lisbon, Porto, Prague and Venice – on how cities are implementing the following strategies:

- Promote the dispersal of visitors within the city and beyond;
- Promote time-based dispersal of visitors;
- Stimulate new visitor itineraries and attractions;
- Review and adapt regulation;
- Enhance visitors’ segmentation;
- Ensure local communities benefit from tourism;
- Create city experiences that benefit both residents and visitors;
- Improve city infrastructure and facilities;
- Communicate with and engage local stakeholders;
- Communicate with and engage visitors;
- Set monitoring and response measures.

To have access and read the UNWTO study, please [click here](#).

European Parliament study on “Overtourism: impact and possible policy responses”



On October 2018, the Committee of Tourism at the European Parliament (TRAN) ordered a study on “Overtourism: impact and possible policy responses”. The study aims to improve the understanding of the wider and more recent development of overtourism, to identify and assess the issues associated with it, and to propose policies and practices to mitigate its negative effects.

The study involves an extensive literature review; the evaluation of 41 case studies; statistical analyses of selected overtourism factors (such as tourism density (bed-nights per km²) and tourism intensity (bed-nights per resident), Airbnb prevalence, airport proximity, cruise port availability, or UNESCO World Heritage Site status), as well as the critical analysis of relevant policy documents. Recommendations to the TRAN Committee count with the following points, amongst other points:

- To advocate commencing data collection, at NUTS 3 level, on the number of tourists and day-visitors, Airbnb and other new forms of accommodation and transport mode shares;
- To initiate debates on tourism growth within destinations, with the goal for destinations to put greater emphasis on qualitative elements of tourism development (profitability; local employment, fair pay rates) rather than continued arrival growth;
- To establish a discussion on governance of sharing economy platforms, such as Airbnb, as entities largely outside the control of destinations and policymakers, yet channeling significant financial resource flows from destinations;
- To involve stakeholders and particularly residents in tourism planning and development processes on a regular basis in all destinations.

To have access the full report, please [click here](#).

INNOVATION AND TECHNOLOGY

Cybersecurity in the hospitality sector



At the beginning of 2019 there are more and more cyber-attacks against hotels and restaurants in France. Among these, some emails are sent with the logo of Booking.com. GNI is raising awareness of its members concerning the high necessity to get cybersecurity processes and reflexes. GNI has regularly published articles with good practices.

This is a key issue and a door to understand why GDPR is important to apply. See here the specific section on the GNI-Synhorcat's website (in French)



European Parliament study on “Overtourism: impact and possible policy responses”



Most hoteliers have a deep understanding of how to cater to their business travel guests, anticipate their needs and ensure they have everything to guarantee a comfortable stay. But what to do in case of big groups

Jacqui Wylde, from the “Insights”, provides the following recommendations:

- Set clear agendas: each guest should have a detailed agenda covering the duration of their stay, including meal times and locations, details and times of all events and activities, information about transportation options or that it has been arranged. Dress codes, details of local attractions, key contacts for the duration of their stay should as well be part of the information;
- Have a designated point of contact: ensuring that each group has someone who oversees the coordination and activities, acting as a point of contact for every aspect of their stay, can leave guests feeling more at ease than having to speak to someone at reception with no knowledge of their trip;
- Security: hotels must ensure that everyone in attendance is who they should be. Schengen requirements should be carefully followed;
- Offer alternative options: large groups of guests can present even more dietary requirements, allergies, disabilities or access requirements which you must be able to properly cater for;
- Checking your inventory: it is important to always make sure everything is well stocked – be it linens, toiletries, food items or tableware – it's always better to have far too much than even one too few. In fact, lively parties, broken tableware and damaged items might need replacement.



EVENTS & TRADE SHOWS

HOTREC's White Paper launched!



On 20th February 2019, HOTREC unveiled the hospitality industry's key priorities for the 2019-2024. The event was hosted by MEP Isabella de Monte and counted with the participation of MEP Istvan Ujhelyi, Claudia Tapardel, Claudia Monteiro de Aguiar, Seamn Kelly, as well as Mr. Antti Peltomäki, Deputy Director Genral of DG Grow and Mr. Carlo Corazza, spokesperson of EP President Antonio Tajani, as well as Council officials.

The five key priorities were presented by the President of HOTREC, Mr. Jens Zimmer Christensen and pass through:

- Further levelling the playing field in the accommodation and food service market
- Revise the EU regulatory frameworks regulating online platforms' liability
- A better Regulation agenda
- Foster voluntary initiatives on nutrition for local food services instead of horizontal EU legislation
- Make the fight against shortage a truly EU case.

Overall, it is the aim of the hospitality sector that Tourism is placed high in the agenda of the EU institutions.



Event on the HOTREC White Paper in Athens



The Challenges and Prospects of the Hospitality Industry in Europe were highlighted by the Hellenic Chamber of Hotels (HCH) in a special event that took place in Athens on the 7th May 2019.

The aim of the event was to place the demands of the European Hospitality sector high on the EU agenda in view of the elections of the European Parliament and the commitment of the Greek parties to them.

In this context, the White Paper of HOTREC was presented by its President Jens Zimmer Christensen, who referred to the key priorities of the hotel and restaurant sector for the new EU mandate 2019-2024. The HOTREC President called on the new European Parliament and the European Commission to embrace the hospitality sector's efforts in order to make sustainable tourism the flagship of European tourism development for the benefit of citizens.

Addressing the Athens event, HCH President Alexandros Vassilikos referred to the historic opportunity to ensure quality and active participation of the tourism industry in European institutions. He called for the implementation of a common European policy that will support the EU hospitality sector, stressing that it is now a political requirement to establish the position of Commissioner for tourism.

A live debate on the Hotrec White Paper followed between Greek candidate MEPs representing the major political parties.



23rd General Assembly of the Hotel Association of Turkey (Türob)



At the occasion of its 23rd General Assembly, taking place on 21st March 2019, in Istanbul, Mr. Jens Zimmer Christensen, President of HOTREC, attended as guest of honor and keynote speaker.

During the event, the President, amongst other topics, took the opportunity to:

- Explain the added value of being a member of the Hotel Stars Union;
- Summarize HOTREC's activities in the field of sustainability (including the development of guidelines to help hospitality establishments reduce food waste and engage in food donations; or the guide to improve energy efficiency in the hospitality sector and
 - Highlight HOTREC's priorities for the next EU mandate (including collaborative economy; digital; better regulation; food policy and skills).



Showcase Conference on Tourism



On 19th March 2019, the European Commission organised a Showcase Conference on Tourism in Brussels.

The aim of the event was to showcase the added-value of EU support for tourism projects under the COSME programme, to inspire more cooperation and participation from the tourism industry in the EU projects and to stimulate reflection on future EU support for tourism projects.

Up to 15 good practices were presented at the following sessions: "Connecting Europe through public and private partnerships" and "Connecting Europe through innovation". The event gathered up to 200 participants, including representatives of public authorities at EU, national and regional level, European tourism sector associations and tourism and travel industry. Commissioner Bienkowska – Commissioner for the Internal Market, Industry, Entrepreneurship and SMEs at the European Commission was also present at the event and highlighted that tourism is a key contributor for job creation and growth. Some examples of the projects presented included:

- Greenways outdoor: the project is about the creation and promotion of outdoor tourism product linking to European greenways (independent non-authorised routes). Hotels with which the project had agreements with saw their direct revenue increase by 200%;
- Eurovelo 5 – the aim was to show how the cycle route could benefit SMEs and local communities and to strengthened cross-border cooperation. A local supply chain along the route was developed;
- A.L.L: the aim is to create transnational accessible tourism products. Packages contained information on restaurants and hotel catering for specific needs;
- Discovers: transnational tourism product developed to attract a senior European audience and encourage visits to Italy, Finland, Austria and Slovenia. 40 different activities and a handbook were organised;
- Creative Loci Iacobi: to promote the visibility of Saint James Ways, new technological tools have been created along with updating cultural and touristic information: geolocation maps; 3D digitalisation; traveller's advisor app; electronic credentials card; multimedia tools;
- Divertimento: the main aim was to widen the scope of the tourism offers within 7 peripheral destinations. It involves highly advanced multi-vision technologies specifically designed to turn silent heritage into speaking objects.

More information about the event can be found [here](#).

The First Pan Baltic Hotel Focused Conference - New Baltic Hospitality Forum in Tallinn



On 4-5 April 2019 the first pan Baltic hotel focused conference took place in Tallinn. Titled: „New Baltic Hospitality Forum“, the one and a half day event encompassed keynote talks and sessions from leading experts as well as panel discussions and opportunities for debate. Hosted in the Rotermann Quarter of Tallinn, the latest mecca of stylish shops, restaurants and hotels, the world-class speakers shared their experiences and motivated participants working in the hospitality sector.

The aim of the forum was to bring the region of the Baltics, Finland, Sweden and parts of Russia closer together, share experiences and find a common ground to move the industry forward and attract young talent.

All founder sponsors, Estonian Hotel & Restaurant Association, Haaga-Helia and Baltic Hospitality & Retail Systems are committed to making this an annual forum that will travel to different locations in the region each year.

The topics of the first forum investigated how we can champion a better future for the hospitality industry, drawing on the knowledge of some of the industry's leading influencers. This year's speakers have all been chosen for their passion, drive and ability to inspire local hospitality professionals to constantly improve. The forum has called upon a variety of influencers from different backgrounds, to provide their influential insights:

From New York, the Director of Training & Development at Standard Hotels Marika Frumes; Leon Baum, the GM of recently opened Kempinski Riga; Kai Schukowski – the youngest General Manager in the history of the Kempinski brand; the former Creative Director of Bang & Olfusen Johannes Torpe, who is now designing hotels; Eivind Hjulstad, CEO of Citybox, the new hotel chain that will open in Tallinn soon; from Finland the Partner at Capman Real Estate Pirjo Ojanperä and Pedro Anderson, the Co-Founder of block chain and technology company Winding Tree.

Photos by Aron Urb.

What's New in HOTREC's membership?

News from EHRA/Estonia



During March 2019, the Estonia Hotel and Restaurant Association hold elections for the new Board. The new appointed Chairman of the Board is Mr. Peter Roose. With a background in Economics, he was a member of the Management Board AS Tallink Group from 2012 until 2015. Since 2015 he became the CEO of OÜ TLG Hotels (subsidiary of AS Tallink Grupp).



News from TÜROB/Turkey



Türob – the Hotel Association of Turkey, has elected Ms. Eresin as the new President this year. Ms. Heresin, graduated from Marmara University as an economist and went to England in 1989 to continue her education on foreign languages and hotel management. She studied at Bath College - BTECH International in Hotel & Catering Management. She held various positions at The Paragon Restaurant, Bath SPA Hotel and then The Royal Crescent Hotel, at Housekeeping, Reservation, Front Office and Food & Beverage Departments.

She graduated from Bath College with honors and returned to Istanbul in 1993, started to work Eresin Hotels and till today is the Vice President of Eresin Tourism. Ms. Eresin has been the Vice President of TÜROB since 2011, and was now elected Presiden of the Association. In addition, Mr. İsmail Taşdemir continues being the Secretary General of Türob.

