



TOURISM AFTER COVID-19
CCOO ACTION PROPOSAL
April 2020



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INTRODUCTION: BACKGROUND BEFORE THE STORM

Three months ago, we concluded in our tourism sector activity Report how the economic and social relevance of Tourism at the global, European and national levels continued to grow.

It is sufficient to recall that **in 2018 Tourism contributed 10.4% to global GDP, generating 319 million jobs** (direct, indirect or induced), representing 1 of every 10 jobs in the world, and in the last 5 years it had generated a fifth of the new jobs. Prior to the pandemic caused by COVID-19, the **estimates from the WTTC** (The World Travel & Tourism Council) envisaged an increase in these figures by 2029: 11.5% to global GDP, 421 million jobs (1 of every 9) and 1 of every 4 new jobs that would have been created.

At European level, in 2018, tourism contributed 9.7% of the GDP, 36.7 million jobs, and was predicted to create 5.2 million new jobs during this decade. **And in our country**, in 2018, overall tourism contributed with 178 billion euros to GDP (**14,6%**), with a growth of 2.4% on the previous year's figures. Overall, Spain was the ninth country in the world in terms of tourism's contribution to GDP, adding 2,831,000 jobs, **14.7% of our country's total employment**. A figure that the WTTC projections predicted to reach 3,434,000 jobs by the end of the decade, generating 600,000 new jobs.

2019, ANOTHER EXCELLENT YEAR FOR TOURISM

Once again, 2019 was an excellent year for tourism, despite the turbulences (Catalonia, Thomas Cook, Brexit) and the recovery of competing markets, adding up to a national total - based on the survey of hotel occupancy- of **108.6 million visitors staying in hotel establishments** -51.5% residing abroad- and 343.2 million overnight stays. The tourism boom continued to have the highest figures since the INE (National Institute of Statistics) began statistical analysis on the sector in 1999.

Compared to the figures from 10 years earlier (2009), visitors had increased by 40.8%, overnight stays by 36.7% and the average revenue per available room (RevPAR) by 66.6%.

On its part, border movement statistics (Frontur (Tourist Movement on Borders)) ranked the **total number of visitors from abroad at 83.7 million** (68.7 million via airport), of which 54.7 millions were stayed in hotel establishments, 9.4 millions in rental housing, 4.2 millions in other market options and 15.3 millions in options outside of the market (owned property, property own by family/friend, ...). These **83.7 million international tourists generated a total expenditure of 92,259 million euros (an average of 1,100 euros per tourist)**.



SECTORAL CHARACTERIZATION OF HOSPITALITY

Focusing on Hospitality, average number of social security registration during 2019 stood at **1,671,132 people at the state level, 1,345,603 on the general system** (employed), and the average employment in hotel establishments increased to **219,784 people**. Highly relevant volume of employment, with its quality as a pending subject: 36.4% temporality, 29.1% of part-time, and high levels of seasonality within the general system, which ranged from 1,175,671 minimum to **1,484,198 maxima** during 2019.

Of these 1.5 million people who are employed in Hospitality, on a stable or seasonal basis, around 1,250,000 are part of the following subsectors: **Hotel (300,000), Catering (850,000) and similar subsectors (100,000** -tourist activities, campsites, those without subsector... -), integrating the scope of the 53 provincial collective agreements.

Their level of fragmentation and unionization is, however, very different:

Within the Hotel subsector 95% of people are attached to companies with 6 or more workers in the province, which means that 60% are listed as voters in electoral processes. On the other hand, within the catering subsector, 92% of people are attached to companies with under 50 workers in the province, bringing the percentage of voters to only 5% of the total (42,000 out of 850,000).

This is not the case for the Collective Catering or the Modern Catering, subsectors employing around 200,000 people, with collective negotiations mostly at the state level, where 80% of people are integrated in companies with 50 or more workers in the province and, consequently, with a level of unionization of around a 60%.

In short, a heterogeneous macro-sector in its composition, with a high level of atomization in the Catering (except collective and modern), and with higher levels of concentration in accommodation services.

In terms of the composition of the business fabric, the atomization levels are logically even: 280,079 companies (252,011 Catering and 29,875 Lodging), 85,776 without employees, 164,428 with between 1 and 9 employees, 29,875 with 10 or more employees.

A business fabric ultimately very much like a SMEs, particularly in bars and restaurants, not in the collective catering (composed of 1,000 companies, from which around 60% of the market lies in the hands of 4 implementation groups at European level) nor in the modern catering, with 10 groups taking up a large part of the market, largely around the franchise model. **A globalization and concentration process, in Collective Catering and Modern Catering, which as will be analysed further below has also occurred in the Hotel Industry, although with other components of complexity.**



HOSPITALITY: A COMPLEX STRUCTURE OF OWNERSHIP, MANAGEMENT AND PROPERTIES

Elaborating into what has been already mentioned about the hotel infrastructure, in recent years there has been a process of permanent transformation of the tourism industry, worldwide and in our country, with **a trend of growth in the model and structure of the hotel subsector, characterized by a dissociation of hotel management and ownership of the property, and not uncommonly also of the management and control of the share (or brand)**. A dissociation in which the management space has been increasingly occupied by national and international hotel chains, in a process of globalization, concentration and acquisitions, in which the shareholding structure is often fragmented by large chains generating a commercial company for each establishment or a number of them, and in which **ownership of the properties has increasingly passed to other agents -private owners, especially banks and investment funds**.

As representative data of the process of globalization, it should be noted that the 10 main hotel chains in the world total almost 75,000 hotels, with 7 and a half million rooms, of which: 4 are from the U.S., 3 Chinese, 1 Indian, 1 British and 1 French. The 25 main Spanish hotel chains (Meliá, Barceló, Eurostar, NH, Riú, H10, Iberostar, Globales, Catalonia...) have a presence in Spain with more than 1,100 hotels representing 25% of Spain's total room offer.

However, as we analyse below when referring to what was the "B" side of the continued tourism boom (the model's sustainability), **possibly the dissociation between management and ownership of the property in the Hotel industry is one of the aspects with a greater capacity to mark the immediate future of the tourism sector, in the current situation**.

The process of selling real estate to investment funds, with high rental fees and rates at the hotel chain's expense, was a globally profitable economic operation for hotel companies during the days of industry growth that we have lived. However, from CCOO we have always warned that the levels of influx and profitability of the sector were partially due to the effects of the concept "borrowed tourism", and that changes in any associated variables could cause a decrease in either parameters. The rent payments to the investment funds that owns the company would, then, generate **financial leverages and liquidity strains** on companies, with subsequent derivative cuts in other expenses (staff, working conditions, maintenance of facilities). We will return to this issue later on the report...

THE "B SIDE" OF TOURISM BEFORE THE STORM: ITS SUSTAINABILITY

Considering the enormous relevance of the tourism industry at global, European and national levels, as well as the impact that touristic activity has at all levels, **from CCOO we**



have reiterated for years that it was increasingly necessary to invest on the sustainability of the touristic model in its triple dimension (economic, social and environmental), translating sustained tourism growth into sustainable development, whilst addressing the changes in the sector.

There have been many occasions when we have warned of the risks associated with a model based on industry growth, without considering its development or its sustainability. **The country's main industry has been based on a continuous and growing boom**, as described in the previous pages, partly accelerated by the circumstances of competing countries, in what we categorized as "borrowed tourism". A boom that has generated an increasing dependence on tourism as a generator of wealth and employment, which has largely conditioned our socioeconomic model at various levels: housing, infrastructure, mobility, trade, ...

The impact is well known and analysed: The phenomenon "Airbnb" and equivalents, with tourist housing (regulated and unregulated) has raised the prices in cities, barging in real estate investment companies and investment funds, as well as causing the phenomenon of gentrification or mass tourism as an element associated with tourist massification. In parallel, infrastructure strategies have been designed with a greater focus towards connectivity with Europe to facilitate tourism influx than towards the proximity network. The urban development of the coast, occurring in parallel to the touristic growth, with its environmental impact and the impact in the design of urban spaces, is also to be added to previously mentioned factors.

In this tourism boom, there has been a greater focus and commitment to **short-term models, focused on maximizing profit**. On the one hand, very disrespectful to the environmental impact and **exceedingly "low cost", especially in mature destinations**. And, on the other hand, with little investment in labour force, contrary to the prior times, has spread adjustment policies of labour costs and unfair competition that promotes the **outsourcing of services through multi-service companies** that, often in fraud, impose enterprise agreements with lower wages and working conditions than sectoral conventions, a dumping that devalues the tourism model and harms the income and health, mainly, of female workers.

To address this, it would have been desirable to promote -in a general, effective and verifiable manner- a sustainable and socially responsible tourism model, based on the quality of the service, employment stability, qualification and vocational training of professionals within the sector, economic sustainability, visitor loyalty, minimisation of the impact on the environment, reinvestment of profit margins... And in order to do this, multiple employment standards, in place since 2012, need to be changed.

And in these circumstances, of obvious strengths, predictable opportunities, poorly weighted weaknesses and disregarded risks, of the main industry in this country... storm of dystopian fiction came...



TOURISM AFTER COVID-19

"THE ONLY CERTAINTY IS UNCERTAINTY"

As the date of this document, mid-April, still immersed in a state of healthcare emergency and of extension of the current national state of alarm, it is extremely difficult to **draw predictions and forecasts** on how a fall of this dimension, for a sector as strategic to our economy as tourism, can be effectively addressed.

It should be remembered that we are talking about a country that receives from abroad over 80 million tourists, and which now faces a situation that, precisely, limits to maximum terms the levels of mobility, which will continue to constrain them for at least 2020 and part of 2021, which has an abrupt impact in economic and employment matters, in addition to its medium and long-term effects on the mentality, consumption habits and trust of citizens, Spanish, European, global.

It remains to be seen in what terms and deadlines these impacts are managed, at the general and tourism level, as well as their respective scales. The WTTC forecasts a short-term impact of more than 20% on direct and indirect employment generated by tourism globally, the World Tourism Organization (ORMT) estimates for 2020 losses that exceed 400 billion euros... a loss of about 33% from the contribution to global GDP in 2019, and equivalent to the value of between 5 and 7 years of growth.

It is also particularly significant to note how the virus is striking harder in the five countries leading the industry: France, Spain, the United States, China and Italy. These are the five countries that share the world's lead in tourism, the ones that attract the greater number of visitors from the planet, based on statistical data from the OMT. In the current health crisis, another international body, in this case the World Health Organization (WHO), also ranks these five countries as the most affected by coronavirus, with the highest number of reported contagions and with the highest mortality rates. **And it's not a coincidence.** The greater international mobility, the climatology and the lifestyle validate these horrible figures, in the opinion of multiple experts.

In regards of the possible scenarios in our country and its impact on touristic activity, the **Report from the Bank of**, published the past 20/04/20, projected a decline of between 2 and 6 points in the contribution to GDP in 2020 of the hospitality, catering and leisure sectors, depending on the number of weeks of confinement (between 8 and 12) and the timeframes of the complete normalization throughout the year. On a similar note, the **Exceltur Report** from the past 16/04/20, based on a 3-month scenario of disease containment (between April and mid-June), in which there would be no touristic activity, followed by a slightly increase, quantified as 92,556 the loss of tourism's GDP (60.7% compared to 2019), with particular impact on Illes (-80.5%), Catalonia (64.8%) Andalusia, the Canary Islands, Madrid and the Valencian Community (between 55% and 58%).

It is still to be determined the extent to which these scenarios and projections are translated into reality at a time when **"the only certainty is uncertainty"** (Dimitrios Buhalis dixit), in an unthinkable situation 3 months ago.



In any event, it is clear that the impact of COVID-19 deeply conditions tourist activity as it directly **affects the mobility of people, which is the essence of tourism**. And the lack of certainty about the development and timeframes of the crisis increases the unknowns about the levels of impact in terms of wealth and employment. As well as about the subsequent recovery of tourist activity, depending on the full availability of touristic services and infrastructures, the trust of tourists and their disposable income.

However, most studies understand that the COVID-19 crisis will undoubtedly have a huge impact on the tourist sector, but that this **will, sooner or later, recover**. This is pointed out by the previously mentioned reports by Bank of Spain and Exceltur, which specifies a **recovery in two phases** (an earlier and gradual one, with recovery of proximity trips in private vehicles, mainly by Spanish nationals and border countries; and a latter one involving commuting in shared transport -train or plane- of both national and international demand), in which the **choice of accommodation in smaller or collective format** will have a lot to do with the protocols of “normalisation” and the trust levels.

It is still to be seen, if the recovery will occur in a progressive or accelerated manner, and to what extent it involves structural changes in touristic activity, and if there will be commitment to a more sustainable model, safer, proximity-based, with lower environmental impact, less short-term thinking and greater influence of the quality of service, professionalism, stability and quality of employment. In essence, **it remains to be seen whether this crisis draws some lessons on how to translate growth into development**.

In any case, it is clear that tourism will be one of the most affected activities, and which will experience a slower recovery, unlike in the 2008 crisis. It is also clear that the impact will be greater on the main segment, sun and beach, on all the peninsular coasts and especially in the Balearic and the Canary Islands due to their dependence to international tourism.

The pandemic is obviously global. However, the rates of spread are not identical, and even if the situation is controlled in one country, the situation in others may still be in the control phase, without ruling out second waves in autumn or winter.

Anyhow, economic recession and uncertainty will cause a significant reduction of leisure or tourism expenditure and more conservative consumer decisions, making it very difficult for international tourism to recover to previous levels in the short to medium term.

This acknowledgement will foreseeably lead mainly redirecting the capability of sustainability and recovery of leisure and touristic activities towards proximity, opening a new space for analysis and debate on models based on proximity tourism.



IMPACT ON ACTIVITY AND EMPLOYMENT

Beyond reflections aimed at the future, and at the moment when a place for strategy to take place exists, in the short term it is clear that the crisis caused by COVID-19 has a huge impact on a key sector, which has been affected from the first instance and with greater intensity, and which is the one that will emerge the latest from this situation, due to the previously mentioned elements: **mobility and trust/safety in the destination.**

In the Hospitality sector, where the average number of contributors to the general social security system (employed) previously stood at 1,345,000, between 29/02 and 31/03, this number has dropped by 184,349 in contributors to the general system and by 5,964 in contributors on a self-employed basis, with a **direct and net impact on employment** of 190,313 fewer contributors (which in the case of the general system, accounts for about 15% of employed people).

To this data, it is to add the **ERTEs (Record of Temporary Employment Regulation) presented in the sector** (95% of which as a necessity or for force majeure), which we estimate around 125,000, with over 800,000 working people included in them. In essence, the vast majority of active employment within the sector in these months.

In this scenario, where the suspensive and reduced hours systems (ERTEs) have avoided a much greater impact on employment, and considering the uncertainty described above, it is strategic to ensure that the tourism sector and the people working within have sufficient financial support to "withstand the pull".

Naturally, opting to avoid the loss of business fabric is essential, through funding and support mechanisms, moratoriums and liquidity, which enable the sustainability of a business fabric largely made up of self-employed people and SMEs, as described previously. **But this commitment must be subject to protecting fixed, fixed discontinuous and seasonal employment with the sustainability of the business fabric**, as well as to ensure systems for social protection and basic income for the affected working people, in a scenario of gradual and uncertain recovery of activity.

In this analysis of the impact on activity, it is also particularly relevant to be aware of the situation of tourism data at the territorial and provincial level, in terms of both, seasonality levels (at maximum and minimum points) and **dependence on foreign tourism.**

In this sense, it is especially noteworthy the **seasonality levels in the Balearic Islands (with a substantial difference over the rest) and in provinces such as Almería, Huelva, Cantabria, Girona or Tarragona.** In all these geographical areas the difference in visitors between minimum and maximum points is under 25%, drawing a wide differential range between influxes in high and low season. **We recommend viewing the detailed data in ANNEX 1.**



In regard to the **levels of dependence on foreign tourism**, these are greater than 70% in the **Balearic Islands, Canary Islands and Barcelona**; and greater than 50% in **Girona, Malaga and Seville**. In the Balearic Islands, the Canary Islands or Malaga, the two following indicators are also noteworthy: the % that represents employment in Hospitality over total employment (above 15%) and the % of average of visitors over total population (over 75% in the case of the Balearic Islands).

	ENTRADA 2019 VISITANTES EXTRANJEROS (ESTADÍSTICA FRONTUR)			GASTO 2019 VISITANTES EXTRANJEROS (ESTADÍSTICA EGATUR)		
	PROMEDIO MENSUAL	MÁXIMO MENSUAL	MÍNIMO MENSUAL	PROMEDIO MENSUAL (MILL €)	MAXIMO MENSUAL (MILL €)	MINIMO MENSUAL (MILL €)
	ANDALUCÍA	1.006.737	1.401.442	559.377	1.044	1.546
ILLES	1.140.077	2.344.104	124.929	1.240	2.892	135
CANARIAS	1.095.586	1.340.619	888.777	1.405	1.744	1.070
CATALUNYA	1.613.186	2.376.608	910.329	1.777	2.999	944
P. VALENCIA	797.100	1.271.169	413.553	802	1.427	438
MADRID	636.533	753.952	499.245	870	1.068	631
O/CCAA	685.789	1.255.888	400.651	550	944	303
ESTATAL	6.975.008	10.121.985	4.195.641	7.688	11.980	4.659

RETURNING TO THE PROPERTY/REAL ESTATE FRAMEWORK IN THE HOTEL SECTOR

Returning to the analysis carried out in previous pages on the dissociative model of property management and ownership of a great part of the hotel industry, and to the financial leverage risks associated with the fixed costs assumed in the form of rental rates, there is no need to explain that, **unfortunately, the worst omens have been met**. And, in the scenarios already described, one of the problems that a great part of the hotel sector must handle when the health alert is raised, in addition to **urgently committing to generate and project trust and safety** (conditioning, deployment of preventive measures, safety and health assurances to employees and clientele, PPE, containment measures, etc.), will be negotiating with **companies and funds that own the properties**. Evidently, this is not a problem affecting exclusively the hotel subsector, as the stress of fixed costs associated with rentals will also reach the Catering sector.

It is not an insignificant issue from the perspective of the possible employment consequences: we have already experienced in previous crises a lack of agreement between operating companies and property owners, which led to labour disputes and even closure of establishments due to the operating company leaving the property (in many cases, as we noted, SA or SLU in the shape of individual CIF, which reduces risks through declaring



servicios

insolvency or by filing agreements with creditors). Therefrom, in the event of a conflict, it would be enforceable for both operating hotel business and companies and funds owning the properties, **to undergo mediations to agree on moratoriums or deferrals to keep companies and jobs alive.**



RECIPROCITY AS A BASIS FOR ACTION

As was previously mentioned, we must be determined in our commitment to avoid the loss of business fabric, through funding mechanisms, support, moratoriums and liquidity, which enable the sustainability of a business fabric largely comprised of self-employed workers and SMEs, as described above.

However, this commitment must be expressly subject to the sustainability of a business fabric that preserves fixed, fixed discontinuous and seasonal employment, and ensures that mechanisms are set in place for social protection and basic incomes for the great number of affected working people, in a scenario of gradual and uncertain recovery of activity.

In other words, companies must be supported because they are the basis of employment, but in conditional and reciprocal terms companies must sustain employment, because it is the basis of business sustainability. And, companies and their main asset, the industry professionals, are the foundation of the sector's sustainability and the reconstruction of its future.

And therefore, for there to be employer's proposals limiting to tax rebate approaches without associated commitments in **corporate social responsibility** is not admissible. Nor is admissible that the multiple measures articulated –and largely raised from the Social Dialogue, with the agreement of the trade unions– in the form of soft credits to companies, aid, deferments in the payment of taxes, moratoriums, ERTes for force majeure with exemptions of between 75% and 100% of the business contribution to Social Security... do not result in a high level of **direct and indirect, permanent and seasonal employment preservation**. Furthermore considering the correlation between the exemptions set out in Article 24 of RDL 8/2020 with respect to ERTes under Article 22 of that RDL, with the company's commitment to preserve employment for the period of six months, from the date of resumption of the activity defined in DA 6a of the same RDL.

THE SITUATION OF STAFF WITH DISCONTINUOUS CONTRACTS

It is particularly significant, not only the enormous impact already mentioned in terms of contributing members to the general social security system that has occurred in the second half of the month of March, indicating multiple redundancies –mostly of eventual and subcontracted staff– especially in the catering sector, but also an **industry resistance to recognizing staff with discontinued contracts under the same conditions as those members with fixed contracts**, in many cases refusing to incorporate them into the ERTes. A resistance that is incomprehensible to us considering the complete exemption of employer social security contributions for companies of less than 50 workers, and 75% exemption from such contributions for companies with over 50 workers.

From CCOO we have worked and will continue to work so that all companies include in



their respective ERTes by Force Majeure the thousands of employees with discontinuous contracts that work within the multiple subsectors of Hospitality in Spain, many of which have been affected by this crisis and the lack of employment and social benefits, or exhausting those that had been recognized. In this respect, our emphasis on the frameworks of Social Dialogue has allowed the **amendment of Article 25.6 of RDL 8/2020, through the final provision 8a of RDL 15/2020.**

CCOO-UGT-CEHAT AGREEMENT (18/04/2020)

As of the date of edition of the present document, it is worth highlighting the agreement reached on 18/04/2020 between CCOO, UGT and CEHAT (Spanish Confederation of Hotels and Tourist Accommodation), **in order to jointly pass to Government proposals to protect the Spanish tourist accommodation sector in the foreground of the current crisis**, committing to promote initiatives that guarantee the strengthening of companies and the continuity of employment in the sector, precisely around the reciprocity principle previously referred to. Within the document (see <https://www.ccoo-servicios.es/html/48191.html>), commitments are made to carry out all the necessary responses for the recovery of activity, the survival of companies and the maintenance of employment.

Among other measures, **the concurrency of force majeure is requested under the current circumstances** (Articles 22, 24 and 25 of RDL 8/2020) of the ERTes within the sector, at least for an initial period of 6 months, whilst calling on ensuring **unemployment protection for workers** included in an ERTE, including **employees with discontinuous contracts** (whose terms were initially gathered within the previously cited RDL 15/2020). Likewise, it is also agreed that the people included in the ERTes collect on the date stipulated in their agreements the total amount of the summer **extra pay**, in addition to the possibility of requesting their advance. Finally, the appeal is agreed on the anticipated date and the **inclusion of staff members with discontinuous contracts within the ERTE.**

The agreement also appeals for a statutory period of **12 months of lack in capital depreciation** for those financial transactions that leverage the activity (paying only interests and extending terms). Safety measures are also agreed **for the restoration of productive activity**, with the commitment of companies to deploy all preventive means to ensure the health and safety of staff and clientele. **In the event of gradual reopening**, it is agreed that undertakings shall not use LES or temporary contracts until the entire workforce affected by the ERTE by force majeure has resumed activity, with the participation of the RLT (Legal Representation of Employees).

Finally, the parties commit to continue the social dialogue to seek **reaching an agreement on other measures** related to the strengthening of the activity, liquidity and capital of companies; the conservation of employment and the acquisitive power of the staff; as well as **define structural changes of the sector**, based on training and retraining of the staff, the renovation and improvement of the physical and digital infrastructures of the sector, and the optimization of the productive fabric and improvement of the tourism model.



CCOO ACTION PROPOSALS

SAFETY, EMPLOYMENT GUARANTEE AND COLLECTIVE BARGAINING AS ASPECTS OF IMMEDIATE FUTURE MANAGEMENT

- In the de-escalation process of the state of alarm, it is clear that will be especially enforceable compliance with the labour guidelines and protocols of protection and safety of the staff that is being reinstated to the work activity. **Health and safety**, firstly, from the awareness that Tourism and Hospitality will predictably be the activities occupying the final part of the de-escalation.
- In addition, the priority, as was indicated, must be to sustain both the **companies and the employment they generate, in conditional and reciprocal terms**, and under the consideration that both, companies and people working within the sector, must be the basis and grounds of sustainability and re-construction of its future.
- It is also time, and we understand that employers should agree with this need, to **reinforce the power of collective bargaining and to seek answers in the sectoral frameworks to establish basic criteria for action**, without prejudice of this commitment being incentivised from the administrations and legislative actions.

BASIC REFLEXIONS AND PREMISES

- 1) From our point of view, after the state of alarm, and for some time, a **strategic priority must be given to the support and recovery of the tourism sector**. Without prejudice to assessments about the composition of the productive fabric of Spain, and decisions regarding future strategies. However, the country currently cannot afford to damage -even more than circumstances will already do- its main engine of growth, wealth and activity generators, as well as direct and indirect employment. This premise seems essential to us.
- 2) Accordingly, we understand that the extension of the **ERTEs by force majeure, based on the current conditions, up to 6 months after the state of alarm has been lifted**, is an essential measure to avoid redundancies in the Hospitality sector.

This is without prejudice to appreciate that the extension of the contribution exemptions, provided under the Article 24 RDL 8/2020, and other measures to support businesses **should be subject to a minimum criteria** (integration of discontinuous fixed employees, guarantee of employment, no impact on extra pay) as well as mechanisms for trade union engagement, all in the terms subsequently developed.



- 3) We understand that public administrations (Government of the Nation, Autonomous Communities, Municipal Corporations) have to clearly commit, with significant economic investment, to promote tourism by enabling specific campaigns, especially **to promote inland tourism and proximity tourism.**

In regard to external tourism, a comprehensive promotion plan for the recovery of activity in a second phase is necessary, which not only includes advertising campaigns in those countries that are traditionally the origin of our tourism, but also addition specific campaigns that might result attractive, both in terms of healthcare guarantees and in terms of cost, without ruling out public grants linking prices to guarantee of employment.

Likewise, it is necessary to **harness and promote the network that Paradores constitutes,** a Public network providing Quality Accommodation with significant room for improvement within the excellence. This great ambassador of the 'Marca España', which promotes a comprehensive development of proximity activities, also has the potential to develop those aspects that concerning the depopulation of the interior areas of Spain.

- 4) Similarly, it is essential to regain the customer's trust, launching a safety message, with a **comprehensive plan of "health guarantees" for all establishments,** with complete disinfection and its certification, as well as monitoring and compliance mechanisms for the enforceability of the daily cleaning processes.
- 5) A detailed strategy to incentivise certain levels of activity recovery, **provided that these health criteria and guarantees are met in an absolutely rigorous manner,** could be to accumulate the surplus of the **IMSERSO Program** of the 2020-2021 season, due to its lack of implementation in this season, with the Program for the 2021-2022 season, advancing its execution to the final quarter of 2020 if the indicated guarantees have been met. This strategy regarding **national social tourism** could partially balance the **fall of international tourism,** especially in the sun and beach portion, affected the most.
- 6) In the area of employment, in addition to the lines of action already indicated, we understand that maintenance and job generation should be promoted from the Administrations (at the state, community and local levels) through the implementation of **employment promotion programmes in the sector at the state level and, mainly, at the Autonomous Community level, as well as complementary measures at the local level.**
- 7) As previously indicated, it is time to reaffirm the power of collective bargaining and seek answers in the sectoral frameworks to establish **basic standards for action in mutual agreement** with employers, without prejudice of this commitment being incentivised from the administrations and legislative action.



We will therefore oppose to the **attempts of employment "flexibilization"** that are being considered or may be raised as a prescription for managing this situation, in the sense of "relaxing" the monitoring of labour standards and the prevention of health risks; or that such flexibility is oriented towards dismissals or unilateral decisions from employers.

The way to manage the present and future of the sector is precisely a joint reconstruction through social dialogue and collective bargaining, in equity of the contracting power of both parties.

- 8) We also believe that the generation of shared analyses and commitments in state, Autonomous Community and local frameworks is essential: **both in the existing Tourism Councils or Boards and through the creation of Sectoral Observatories.**
- 9) Without prejudice to the long-term reflections that will need to be made, **within the situation set for 2020 and part of 2021, it is possible and there must be progress in two lines of action that we understand could be strategic:**
 - **Diversification of the tourism model**, seek for added value such as MICE Tourism, **social tourism** strategies (not just older population), medium-term strategies regarding foreign tourism...
 - **Taking advantage of the transition period until the activity is fully resumed to push for investments on improvement of production factors:** Physical and digital infrastructures (which can generate induced employment of other branches of activity) and, clearly, committing to a comprehensive training plan in the tourism sector, linked to the professional hospitality card.
 - Complementary to the health certifications, the implementation of the **Fair Hotels Labour Responsible (HJLR) project**, an initiative of CCOO and UGT in collaboration with the University of Malaga, is even more appropriate. This project, very focused on the quantification, assignation of value and estimation of indicators that will be increasingly appreciated by society, such as sustainability and corporate social responsibility, will serve as the basis for making a global assessment of a fair hotel from the labour point of view towards its workers, generating a differentiating quality label.
10. **And, now in view of future reflections on structural changes within the sector:**
 - **Provide continuity to staff training and retraining strategies**, the already referred to as **Professional Card** as a strategic priority and **Digital Training**, as one of lines of improvement of the employability and productivity of the work factor.



- **Rehabilitation and improvement of the physical and digital infrastructures of the sector**, especially in mature destinations.
- **A Social Plan of Intergenerational Agreement**, to promote non-traumatic generational replacement of working people with long and stressful careers and the incorporation of young people to the workforce.
- It will be essential to place **debates and consensus regarding the optimization of the productive fabric**, promoting in these an increase of the average size of companies.
- The **improvement of the touristic model**, also through more effective tax collection mechanisms, debate on finalist tourist fees focused on investment in the **sustainability of the model**.
- Enabling mechanisms for **public-private collaborative synergies**, as well as deliberations in terms of national strategy on how to prevent mechanisms that enable companies to transfer their income to **external financial positions** of speculative nature or the formation of monopolies.

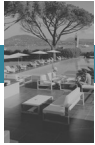
STRUCTURE OF OUR PROPOSALS FOR ACTION

Below we structure our basic proposals crossing areas of activity:

LABOR, HEALTHCARE, ECONOMY, FISCAL, INSTITUTIONAL

Competitive areas:

STATE, AUTONOMOUS COMMUNITY, LOCAL

**LABOUR ACTION AREA****STATE FIELD OF COMPETENCE****6 MONTHS EXTENSION OF ERTES FOR FORCE MAJEURE ART. 22 RDL 8/2020**

6-month extension after the end of the state of alarm of the ERTes by force majeure, in Hospitality and Tourism, authorized under Article 22 RDL 8/2020.

6 MONTHS EXTENSION OF THE WAIVER ON EMPLOYER'S CONTRIBUTION ART. 24 RDL 8/2020

Conditional extension of 6 months after the end of the state of alarm of the waiver of employer's contribution to social security under Article 24 RDL 8/2020 (75% or 100% depending on company size).

6 MONTHS EXTENSION EXTRAORDINARY MEASURES OF UNEMPLOYMENT BENEFITS ART. 25 RDL 8/2020

6 months extension after the end of the state of alarm of the extraordinary measures under Article 25 RDL 8/2020 in respect to unemployment benefit if the workers (fixed, discontinuous, seasonal) continue with the contract suspended or the reduced working hours by ERTes derived from Article 22 or 23 RDL 8/2020.

AUTONOMOUS FIELD OF COMPETENCE**COMPLEMENTARY AID IN ERTES**

Autonomous Communities budget endowment for additional support to State benefits for workers affected by ERTE, with duration equivalent to that of the ERTE and amounts depending on budgetary availability.

LOCAL FIELD OF COMPETENCE

**STATE FIELD OF COMPETENCE****INCLUSION IN FIXED DISCONTINUOUS ERTES**

Legal obligation to incorporate staff with discontinuous contracts, whose periods of activity coincide with the period of validity of the ERTE and whose extensions have not been included in the extended ERTE, as a prerequisite for the exemption of the employer contributions to Social Security.

IMPACT OF ERTES ON EXTRA PAYCHECK 'DEVENGO'

Taking into account the amount of unemployment benefits and their caps, establishing that the workers affected by the ERTE collect on the established dates the total amount of the corresponding extraordinary payment, in proportion to their respective duty time.

PREFERENTIAL INCORPORATION GUARANTEES

The above measures of extension are subject to compliance with, in the event of gradual reopening of the establishment whilst the ERTE, the business does not resort to employment agencies or temporary employment until the re-entry of all the affected staff members by the ERTE, fixed or discontinuous.

EMPLOYMENT REINFORCEMENT GUARANTEE DA 6A RDL 8/2020

Reinforcement guarantee of preservation of employment for 6 months from the effective restart

AUTONOMOUS FIELD OF COMPETENCE**INCLUSION IN FIXED DISCONTINUOUS ERTES**

Strengthening from the Autonomous Administration of the inclusion in the ERTES of staff with discontinuous contracts, whose periods of activity coincide with the period of validity of the ERTE and the extension of its effects, including these in the application of the additional support indicated above.

EMPLOYMENT MAINTENANCE PROMOTION PLANS

Incentive lines by Autonomous Communities for companies demonstrating the maintenance of

LOCAL FIELD OF COMPETENCE**EMPLOYMENT MAINTENANCE PROMOTION PLANS**

Incentives by Municipalities for SMEs that prove the maintenance of employment to date 31/12/2020.



of the activity/completion of the ERTE.

STATE FIELD OF COMPETENCE

STRENGTHENING COLLECTIVE BARGAINING'S ROLE

Reinforcement oriented from the Tripartite Social Dialogue and the ALEH of the role of collective bargaining, recovering of the contractual equity of the parties and the prevailing sectoral agreement, to enable the management of the entire transitional process of standardization of tourism activity:

- Definition of minimum criteria in case of ERTes due to objective reasons.
- Guidelines and timeframes for the return to the workforce of those included in ERTes.
- Management of working time (irregular working hours, overtime, variable workforce needs).
- Procedures that difficult the non-application of agreements that could be raised by companies.
- Specification of all these aspects with the RLT (Legal Representation of Employees) of each company, if this exists.

Strengthening the structure of Collective Bargaining in Hospitality, consensually assessing the definition of the HDA as a Framework Convention, with extended and reinforced content, in order to serve as an instrument of global redefinition of the sector in a new scenario.

employment to date 31/12/2020.

AUTONOMOUS FIELD OF COMPETENCE

STRENGTHENING COLLECTIVE BARGAINING'S ROLE

Targeted from the areas of Social Dialogue, strengthening, at the Autonomous Community level, the role of regional and local collective bargaining, restoring contractual equity of all parties and the primacy of the sectoral agreement, to enable management of the transitional process of standardization of basic tourist activity:

- Definition of minimum criteria in case of ERTes due to objective reasons.
- Guidelines and timeframes for the return to the workforce of those included in ERTes.
- Management of working time (irregular working hours, overtime, variable workforce needs).
- Procedures that difficult the non-application of agreements that could be raised by companies.
- Specification of all these aspects with the RLT of each company, in the case it exists.

LOCAL FIELD OF COMPETENCE

STRENGTHENING COLLECTIVE BARGAINING PAPER

Targeted from the areas of Social Dialogue, strengthening, at the province level, the role of provincial collective bargaining, restoring contractual equity of all parties and the primacy of the sectoral agreement, to enable management of the transitional process of standardization of basic tourist activity:

- Definition of minimum criteria in case of ERTes due to objective reasons.
- Guidelines and timeframes for the return to the workforce of those included in ERTes.
- Working time management (irregular days, overtime, variable workforce needs).
- Procedure guidance for the non-application of agreements that could be raised by companies.
- Concrete of all these aspects with the RLT of each company, if any.

**STATE FIELD OF COMPETENCE****ERTEs DUE TO OBJECTIVE CAUSES**

Once the extension periods for the ERTes by MF have been exhausted, ERTes for objective reasons that could be linked up in those companies that need it may benefit from bonus contribution mechanisms to social security, always subject to employment preservation for 6 months and the fulfilment of the minimums agreed under the sectoral convention of application (or, in the event of such a definition, to the agreement in consultation period).

INTERGENERATIONAL AGREEMENT SOCIAL PLAN

Social Plan of Intergenerational Agreement, to promote non-traumatic generational replacement of working people with long and stressful careers and the incorporation of young people.

RECOVERY OF THE PARTIAL RETIREMENT MECHANISM

As an exception, application of the legislation prior to Law 27/2011, from 1 August, for events caused from 15/03/2020 to 31-12-2022, as articulated in the manufacturing industry.

TRAINING PLANS/PROFESSIONAL CARD

2020 specific Training Plan for the Hospitality Sector,

AUTONOMOUS FIELD OF COMPETENCE**ERTEs DUE TO OBJECTIVE CAUSES**

Autonomous Community's budget endowment for additional support to State benefits for workers affected by ERTes, with duration equivalent to that of the ERTE and amounts depending on budgetary availability.

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Social Plan of Intergenerational Agreement, to promote non-traumatic generational replacement of working people with long and stressful careers and the incorporation of young people.

TRAINING PLANS/PROFESSIONAL CARD

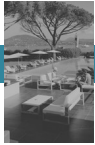
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LOCAL FIELD OF COMPETENCE**INTERGENERATIONAL AGREEMENT SOCIAL PLAN**

Social Plan of Intergenerational Agreement, to promote non-traumatic generational replacement of working people with long and stressful careers and the incorporation of young people.

TRAINING PLANS/PROFESSIONAL CARD

2020 specific Training Plan for the Hospitality Sector,



and momentum for the implementation of the Professional Card Project.

FAIR HOTELS LABOUR RESPONSIBLE PROJECT

Boost for the implementation of this quality stamp for hotels based on the evaluation of sustainability indicators and internal/work CSR, based on a quantification and projection of indicators promoted by CCOO and UGT, in collaboration with the University of Malaga.

and momentum for the implementation of the Professional Card Project.

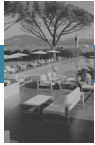
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HEALTHCARE ACTION AREA

STATE FIELD OF COMPETENCE

Arrangement and coordination of basic measures to **restore of tourist activity** by the healthcare authorities, with involvement of trade unions and business organizations.

Effective updating, monitoring and management of the recommendations within the "**Guide to Good Practices in the Tourism Sector to COVID-19**".

Prioritize guidelines and criteria to resume the activity giving the **maximum health and safety guarantee to the clientele and staff**; and building trust as a crucial element.

Guaranteed supply of PPE, such as masks, gels, gloves, etc., all those that are necessary to ensure health and safety.

Performing the greatest possible **COVID-19 screening** to those workers returning to activity, in order to prevent infected or asymptomatic people from joining the workplaces.

Certification mechanisms for establishments that have been disinfected.

AUTONOMOUS FIELD OF COMPETENCE

Arrangement and coordination of basic measures to **restore of tourist activity** by the healthcare authorities, with involvement of trade unions and business organizations.

Effective updating, monitoring and management of the recommendations within the "**Guide to Good Practices in the Tourism Sector to COVID-19**".

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LOCAL FIELD OF COMPETENCE

Arrangement and coordination of basic measures to **restore of tourist activity** by the healthcare authorities, with involvement of trade unions and business organizations.

Effective updating, monitoring and management of the recommendations within the "**Guide to Good Practices in the Tourism Sector to COVID-19**".

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Certification mechanisms for establishments that have been disinfected.



ECONOMIC ACTION AREA

STATE FIELD OF COMPETENCE

CONTINUITY ECONOMIC MEASURES

Assess the ability to provide continuity within the tourism sector to measures articulated within RDL 7/2020, RDL 8/2020 and RDL 11/2020, **conditionally to the employment preservation policies:**

- Specific ICO (Official Credit Institute) line of financing.
- Temporary suspension of interest and loan repayments from the public sector.
- Guarantee lines and public guarantees.
- Temporary extension of Mortgage Moratorium agreement in cases of significant revenue fall.
- Evaluation of objective circumstances for broad moratorium payment of social contributions and/or deferment payment of debts to the Social Security.

PAYMENT CHAIN PROTECTION

Strengthen the liability mechanisms to deal with committed payments, on an agreed date, by all market operators.

AUTONOMOUS FIELD OF COMPETENCE

STRENGTHENING/CONTINUITY OF ECONOMIC MEASURES

Assess the capability to strengthen for the tourism sector, within the Autonomous Community, the measures articulated at the state level, as well as perpetuate those that have been articulated in each Autonomous Community, **conditionally to the employment preservation policies:**

- Funding lines specific to the tourism sector.
- Temporary suspension of interest and loan repayments from the public sector.
- Lines of guarantees and public guarantees.
- Assessment of objective circumstances for deferment payment of debts with Autonomous Communities.

PAYMENT CHAIN PROTECTION

Strengthen the liability mechanisms to deal with committed payments, on an agreed date, by all market operators.

LOCAL FIELD OF COMPETENCE

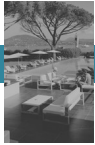
STRENGTHENING ECONOMIC MEASURES

Assess the capability to strengthen measures articulated at the state level at the level of the Autonomous Communities for the tourism sector, **conditionally to the employment preservation policies:**

- Funding lines specific to the tourism sector.
- Lines of guarantees and public guarantees.
- Evaluation of objective circumstances for deferment payment debts with City Hall.

PAYMENT CHAIN PROTECTION

Strengthen the liability mechanisms to deal with committed payments, on an agreed date, by all market operators.



AIRPORT FEES 2020

Elimination/temporary bonus and visa offers at no economic cost for travellers.

RESTRICTION UNILATERAL ACTIONS

Control measures and restriction of unilateral actions that could undertake intermediaries of the tourism's marketing that do not hold agreements with Spanish companies. Returns vs booking changes.

AIRPORT FEES 2020

Elimination/temporary bonus and visas offer at no economic cost for travellers.

LIQUIDATION OF GRANTS

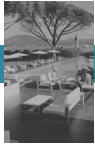
Corresponding to 2019 and which awaiting to be received.

AIRPORT FEES 2020

Elimination/temporary bonus and visas offer at no economic cost for travellers.

LIQUIDATION OF GRANTS

Corresponding to 2019 and which awaiting to be received.



■ FISCAL ACTION AREA ■

STATE FIELD OF COMPETENCE

To assess the ability to follow up, in the tourism sector, measures already articulated in taxation and where appropriate implement other tax mechanisms, which are cited below, in every case **conditionally to the employment preservation policies.**

Temporary deferment of state tax payments, when under objective circumstances there is a need for liquidity, for tourist sector's freelancers and SMEs.

Relaxation of payment deferrals of tax debts with the Administration, to avoid liquidity strains of the self-employed and SMEs.

Evaluation of objective criteria for tax credits in certain circumstances.

Favourable treatment of tax donations and collaborations during the healthcare crisis (Hotels for essential services, donations of material, etc.)

AUTONOMOUS FIELD OF COMPETENCE

Assess the ability to follow up, in the tourism sector, the measures already articulated in taxation at the Autonomous level and, where appropriate, strengthen state mechanisms, in any case **conditionally to the employment preservation policies.**

Temporary deferment of state tax payments, when under objective circumstances there is a need for liquidity, for tourist sector's freelancers and SMEs.

Relaxation of payment deferrals of tax debts with the Administration, to avoid liquidity strains of the self-employed and SMEs.

Evaluation of objective criteria for tax credits in certain circumstances.

Promotion of improvements and training of the hotel infrastructure taking advantage of the period of circumstantial inactivity.

LOCAL FIELD OF COMPETENCE

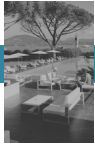
Assess the ability to follow up, in the tourism sector, those measures already articulated in taxation at the local level and, where appropriate, strengthen state mechanisms, in any case **conditionally to the employment preservation policies.**

Temporary deferment of state tax payments, when under objective circumstances there is a need for liquidity, for tourist sector's freelancers and SMEs.

Relaxation of payment deferrals of tax debts with the Administration, to avoid liquidity strains of the self-employed and SMEs.

Evaluation of objective criteria for tax credits in certain circumstances.

Promotion of improvements and training of the hotel offer taking advantage of the period of circumstantial inactivity.



■ INSTITUTIONAL ACTION AREA ■

STATE FIELD OF COMPETENCE

The **Spanish Tourism Council**, as an area of engagement of the sector's different stakeholders, at public and private level, must play an essential role in defining tourism policies within the scenario caused by the COVID-19 pandemic.

Creation of a **STATE OBSERVATORY** to analyse tourism strategies connected with the Spanish Tourism Council and the Board of the ALEH.

Campaigns targeting the **recovery of the brand image as tourist destination**, with special focus on national and proximity tourism.

AUTONOMOUS FIELD OF COMPETENCE

The **Autonomous Community Tourism Councils, or equivalent areas**, as an area of engagement of the sector's different stakeholders, at public and private level, must play an essential role in defining tourism policies within the scenario caused by the COVID-19 pandemic.

Creation of an **OBSERVATORY AT AUTONOMOUS COMMUNITY LEVEL**, to analyse territorial tourism strategies connected with the Autonomous Community Tourism Council or equivalent area.

Campaigns targeting the **recovery of the brand image as a tourist destination**, with special focus on national and proximity tourism.

LOCAL FIELD OF COMPETENCE

Tourism Councils at the local level, or equivalent areas, as an area of engagement of the sector's different stakeholders, at public and private level, must play an essential role in defining tourism policies within the scenario caused by the COVID-19 pandemic.

Creation of **SECTORIAL OBSERVATORIES at the provincial and local levels**, to analyse tourism strategies connected with the Tourism Councils at the local level and the areas of sectoral collective bargaining.

Campaigns targeting the **recovery of the brand image as a tourist destination**, with special focus on national and proximity tourism.



ANNEX 1.

2019 DATA TOURIST SITUATION (TOTAL VISITORS, SPANISH VISITORS, FOREIGN VISITORS) BY AUTONOMOUS COMMUNITY AND PROVINCE. MONTHLY AVERAGE, MONTHLY MAXIMUM AND MINIMUM.

As indicator of seasonality, % of monthly MIN over MAX is calculated, indicating greater seasonality the lower the % result is. Highlighted in yellow are those % \geq 15%, for total number of visitors, Spanish visitors and foreign visitors.

It is also calculated the % of foreign visitors over the total number of visitors, for the monthly average, the monthly maximum and the monthly minimum, as an indicator of level of dependence on foreign tourism. Highlighted in orange are those % \geq 50%.

2019 POPULATION DATA BY AUTONOMOUS COMMUNITY AND PROVINCE.

The % representing the total number of visitors (average) over the population data is calculated. Highlighted in green are those % \geq 25%.

DATA ON GENERAL SOCIAL SECURITY SYSTEM (EMPLOYED). MONTHLY AVERAGE. TOTALS AND HOSPITALITY.

% representing the average contributors to the general system for Hospitality over the average of total contributors to the general system is calculated. In pink have been highlighted those % \geq 15%.

As an indicator of employment seasonality within Hospitality, % of monthly MIN over MAX of the monthly contributors to the general system within Hospitality is calculated. Greater seasonality presents lower % values. The results with % \geq 60% have been highlighted in blue.

