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**EXECUTIVE
SUMMARY**

STRONGER HOSPITALITY:

Building Trade Union
Capacity for a Thriving
Social Dialogue



EXECUTIVE SUMMARY

This synthesis offers a critical and in-depth overview of the main findings presented in the *Final Report and Handbook of the Stronger Hospitality* project. Coordinated by EFFAT and funded by the European Union, the project explores the current state of industrial relations and social dialogue in the European hospitality and tourism sector, focusing on twelve EU Member States¹. The research was carried out by ADAPT and CELSI, serving as external experts to the project.

The document presents a thematic and comparative analysis based on extensive desk research, expert interviews with trade unionists and researchers, and a series of participatory events. These included national mappings, webinars, two workshops held in Prague (April 2024) and Larnaca (April 2025), and a final conference held in Valencia (November 2024).

The aim is to support trade unions in understanding and addressing structural challenges, as well as in identifying emerging strategies across the sector. The five key thematic areas – reflecting the overarching research framework – are: union membership and organisational capacity; collective bargaining coverage and content;

improvement of working conditions; institutionalisation of social dialogue; and cross-border and supranational coordination. Each section accounts for geographical variation and considers the interplay between different industrial relations systems and the forms of union action observed in practice.

The analysis reveals enduring structural challenges – such as low union density, fragmented employer representation, and limited collective bargaining coverage – particularly prevalent in Southern and Eastern Europe. At the same time, it identifies promising areas of innovation, including the use of digital tools to engage young and migrant workers, training-based empowerment strategies, and emerging forms of collaboration involving municipalities and civil society actors.

A key takeaway from the project is the critical role of transnational exchange and coordination. It created spaces for peer learning, enabling trade unionists from diverse national contexts to observe, share, and adapt effective practices. The research also underscores the strategic potential of transnational framework agreements in establishing minimum standards and addressing cross-border issues beyond the scope of national regulation.

¹Cyprus, Estonia, Lithuania, Netherlands, Romania, Slovakia, Slovenia, Czech Republic, Greece, Latvia, Malta, and Portugal.

Finally, the synthesis highlights the policy relevance of the EU Directive on Adequate Minimum Wages (Directive (EU) 2022/2041), which is seen as a potential catalyst for revitalising collective bargaining in under-regulated sectors such as hospitality. In this context, the role of EFFAT and other Eu-

ropean trade union federations is crucial—not only in fostering cross-border cooperation, but also in equipping national affiliates to confront shared challenges through coordinated strategies and collective tools.

INTRODUCTION

The hospitality and tourism sector functions both as a mirror of contemporary labour market dynamics and as a testing ground for innovative approaches to industrial relations. Characterised by high staff turnover, significant employment of young and migrant workers, and a predominance of non-standard contractual arrangements, the sector poses substantial challenges to traditional forms of collective representation. At the same time, its deep integration into local economies and increasing exposure to transnational business models position it as a strategic arena for exploring the potential of social dialogue.

This synthesis presents and interprets the key findings from the Final Report, while also incorporating examples and recommendations from the Stronger Hospitality Handbook. The Final Report consolidates the main outcomes of the project and builds on insights initially developed in the interim research phase. The earlier version (previously referred to as the 'Interim Report') drew on extensive data collected through desk-based research, semi-structured interviews with key stakeholders, national mappings, and participatory events such as workshops and webinars. This process culminated in a final research output that reflects not only updated evidence but also the interpretative insights gained through cross-national peer exchange facilitated by EFFAT.

The Handbook complements the Final Report by systematising a range of illustrative practices and actionable strategies in the field of social dialogue, offering practical guidance for trade unionists operating across diverse national contexts.

This synthesis weaves together the project's two core strands – research and operational strategy – through a lens that is both rigorous and accessible. It maintains thematic coherence while emphasising territorial specificities and structural patterns across the national case studies. Particular attention is paid to contrasting forms of industrial relations, ranging from the more coordinated systems of Central and Northern Europe to the fragmented or liberal models found in Southern and Eastern Europe, where variations in union presence, employer representation, and institutional support give rise to distinct approaches to collective action and negotiation.

UNION MEMBERSHIP AND ORGANISATIONAL CAPACITY

1

Across the EU, the hospitality and tourism sector consistently records some of the lowest levels of trade union density. This issue is particularly pronounced in Central and Eastern Europe, where post-socialist transitions have led to the liberalisation and fragmentation of labour relations, often resulting in weak institutional support for trade union development. Countries such as Slovakia face structural barriers to unionisation, including the limited presence of workers' representatives in small and medium-sized enterprises (SMEs), the prevalence of informal employment, and the near absence of strong sectoral employer organisations capable of sustaining stable social dialogue.

By contrast, some Western and Southern European countries – notably Italy, France, and Spain – benefit from more established trade union traditions and institutionalised collective bargaining frameworks. However, the structural characteristics of the sector – such as seasonality, high staff turnover, informality, and the predominance of micro-enterprises – continue to hinder effective union outreach, particularly among young and migrant workers.

These groups frequently encounter linguistic, cultural, and administrative barriers and are often disconnected from formal channels of representation. This disconnect is further exacerbated by a widespread lack of awareness regarding the role of trade unions, especially in workplaces where their presence is minimal.

The fieldwork conducted for the Final Report revealed a diverse range of strategies aimed at addressing the structural challenges facing trade unions in the hospitality sector. In France, for example, unions have implemented rights-awareness campaigns specifically targeting newly arrived migrant workers. These initiatives incorporate multilingual materials and partnerships with local community organisations, grounded in the understanding that union legitimacy must be cultivated from the ground up. A notable practice includes the provision of translated employment contracts and clear guidance on legal entitlements.

In the United Kingdom – characterised by a liberal industrial relations system and the absence of

mechanisms to extend collective agreements – Unite has developed targeted initiatives for young hospitality workers. *The Young, Gifted and Backed* campaign combined digital outreach with peer-led training and the establishment of youth-focused representative structures. While national-level bargaining is lacking, such strategies enable unions to establish a presence within specific workplaces and negotiate company-level collective agreements.

A key finding from the research is the interdependence between union membership and organisational capacity. Recruitment efforts must be supported by ongoing investment in training and the development of internal competencies. In countries such as Greece, Portugal, and Romania, union representatives reported a need for greater support in navigating the legal and organisational complexity of the sector. Training programmes – particularly those developed in collaboration with external experts or specialised training centres – play a crucial role in building capacity, enhancing credibility, and improving unions' ability to engage effectively with employers.

The research also underscores the growing importance of technology in reaching dispersed and hard-to-organise workers. In several countries, trade unions are experimenting with mobile applications and social media platforms not only as tools for communication, but also for managing membership and delivering services. These digital approaches are especially valuable in contexts

where traditional workplace-based organising is impractical – whether due to the predominance of small establishments or the rise of digital employment platforms.

In addition, the type of industrial relations system plays a decisive role in shaping union influence and strategy. In coordinated systems such as those in France, Italy, and Spain, even unions with moderate membership density may benefit from institutionalised access to collective bargaining and policymaking. By contrast, in liberal or transitional systems, union influence depends far more on visibility, grassroots engagement, and the ability to respond quickly to localised challenges. In countries like Cyprus or Czechia, the absence of mechanisms to extend collective agreements means that unions must rely on voluntary arrangements and the mobilisation of individual workers – necessitating a more agile and responsive organisational model.

As emphasised in both the Final Report and the *Handbook*, peer-to-peer learning and the establishment of transnational support networks are crucial in addressing imbalances in resources and expertise. Unions from countries with stronger institutional frameworks have supported their counterparts by sharing training materials, organising joint campaigns, and participating in collaborative projects coordinated by EFFAT. These collaborations go beyond technical assistance – they foster the development of a shared strategic culture that spans diverse industrial relations systems.

In conclusion, enhancing union membership and organisational capacity within the hospitality and tourism sector requires a dual approach: structural (institutional access, legal support, funding) and tactical (tailored outreach, training, innovation). Only through this two-pronged strategy can unions begin to counteract the decline in representation and rising precarity in a sector that, despite its central role in

Europe's economic and social fabric, is often characterised by fragmented employment relationships, high turnover, and limited institutional involvement.

COLLECTIVE BARGAINING COVERAGE AND CONTENT

2

Collective bargaining coverage in the hospitality and tourism sector remains highly uneven across EU Member States, strongly influenced by the national structure of industrial relations. In coordinated market economies, sectoral bargaining mechanisms are institutionalised and often supported by law, enabling broad collective agreement coverage even in sectors with relatively low union density. These institutional frameworks ensure that minimum standards are applied widely across the workforce, including in enterprises where unions have no direct presence.

In contrast, in liberal and post-socialist economies, such as the United Kingdom and Slovakia, bargaining systems tend to be fragmented. In these countries, collective bargaining is largely decentralised and typically confined to large or multinational companies. As a result, significant portions of the workforce – especially those employed in SMEs, which dominate the hospitality sector – are excluded from the scope of any collective agreement. Consequently, large segments of workers operate under statutory minimum conditions, or in some cases, informal arrangements that provide no legal protection at all. This legal and

institutional void fosters downward competition, precarious working conditions, and increased heterogeneity in employment standards.

The Dutch system is highlighted in the research as a model of inclusive bargaining coordination. As outlined in the *Final Report*, collective agreements negotiated between representative unions and employer organisations can be extended by the Ministry of Social Affairs and Employment to cover the entire sector, provided they meet representativeness thresholds. This extension mechanism not only stabilises sectoral employment conditions but also prevents unfair competition by eliminating the possibility of undercutting agreements negotiated by non-representative parties or through individualised employer arrangements. Similar extension practices are also found in other coordinated systems, such as in Italy and France, where the administrative extension of sectoral agreements plays a key role in ensuring broad coverage, reducing fragmentation, and maintaining a level playing field. These examples demonstrate how thoughtful institutional design can effectively counteract structural disintegration within the sector.

In contrast, in countries like Slovakia, the absence of legally mandated extension mechanisms, coupled with weak or non-existent employer associations in hospitality, leads to a proliferation of firm-level agreements – if any exist at all – and a general lack of sector-wide regulation. The research found that in many Eastern European countries, collective bargaining has largely collapsed at the sectoral level, leaving unions with limited capacity to influence wages or working conditions, except in isolated enterprises.

Beyond the issue of coverage, the substance of agreements – their qualitative dimension – also exhibits significant variability. Countries such as Italy, Spain, and Belgium provide examples of agreements that are tailored to the specific dynamics of the sector. These include provisions for accommodation and transport for seasonal workers, additional protections for night work and overtime, and well-structured job classification systems linked to training and skills progression. In some instances, agreements incorporate clauses designed to address workforce fragmentation, such as those covering agency or platform-mediated work.

However, in many Member States, particularly in Southern and Eastern Europe, the content of hospitality agreements remains rudimentary. Fieldwork interviews conducted in countries like Cyprus, Czechia, and Romania revealed that many agreements tend to use generalist language and fail to address the

specific realities of workers in the hospitality sector. Issues such as unpredictable working hours, the need for ongoing training in customer service roles, and protections for mobile and migrant workers are often overlooked. Where bargaining does take place, it is typically reactive and minimalist, lacking ambition or a long-term vision.

In response to these gaps, the project documented a range of promising practices aimed at modernising and adapting the content of collective agreements. These practices include linking bargaining outcomes to vocational training opportunities, skills certification, and participation in publicly recognised qualification systems. For instance, Italian sectoral agreements have introduced clauses that incentivise training by linking wage progression to the acquisition of certified skills. In France, the integration of agreements with publicly funded training schemes allows workers to accumulate training rights (via the *Compte Personnel de Formation*) that are transferable across jobs and employers.

These initiatives not only empower workers but also reinforce the role of trade unions as providers of professional development pathways, particularly for young people entering the sector. They offer an alternative to the widespread perception of hospitality as a temporary or low-status industry by embedding career development within the regulatory framework. Simultaneously, they illustrate how collective bargaining can go beyond wage

and hour regulation to shape the broader employment structure and enhance social mobility within the sector.

Ultimately, the findings from the Final Report emphasise that the effectiveness of collective bargaining in the hospitality and tourism sector depends on both institutional support and content innovation. While coverage is determined by representativeness rules, extension mechanisms, and employer organ-

isation, the quality of the content reflects the ability of unions and employers to address the real challenges faced by the sector – whether technological, demographic, or organisational. Strengthening both of these dimensions is crucial for building a resilient and inclusive bargaining system that can adapt to the evolving nature of hospitality work across Europe.

IMPROVEMENT OF WORKERS' CONDITIONS

3

Working conditions in the hospitality and tourism sector are among the most precarious in the European labour market. This precariousness arises from multiple structural factors: atypical employment contracts, intense seasonality, low union density, and weak or fragmented regulation of employment relationships. These vulnerabilities are further exacerbated in a sector where many workers are employed in dispersed micro-enterprises or outsourced roles, making oversight and enforcement more challenging. The *Final Stronger Hospitality Report* highlights that extended and irregular working hours, unpredictable scheduling, low pay, and exposure to workplace risks are common across Member States. Additionally, interviews conducted during the project consistently emphasised the persistence of undeclared or under-declared work, particularly in Southern and Eastern Europe.

The situation is especially critical in countries where labour inspection bodies are underfunded or politically weakened. For instance, in Greece, Romania, and Lithuania, stakeholders noted that institutional oversight is often inadequate to ensure compliance with

legal standards, particularly in the lower tiers of the value chain (e.g., subcontracted catering services or small independent accommodations). In such contexts, enforcement tends to be reactive rather than preventative, and workers are often hesitant to report violations due to fears of retaliation or job loss.

Nonetheless, some Member States are adopting innovative approaches to monitor and regulate working conditions. A notable example is Greece's introduction of the *Digital Work Card*, a technological tool designed to digitally track real-time working hours through integration with the Ergani information system. The measure – developed under Law 4808/2021 – aims to enhance transparency and combat undeclared labour, particularly in sectors like hospitality, where time tracking is often informal or absent. This initiative has the potential to strengthen worker protections, provided it is supported by collective bargaining frameworks and robust monitoring by social partners. Its success will depend on effective implementation, enforcement capacity, and the extent to which unions and employers engage with the data it generates. From the comparative analysis conduct-

ed across the twelve participating countries, four recurring priorities emerge as central to improving working conditions in the hospitality sector:

- Transparent and enforceable working time regulations, particularly regarding night work, split shifts, and overtime remuneration. Several unions have reported instances where employers deliberately blur contractual obligations through the use of “on-call” clauses or informal scheduling, leaving workers with unpredictable incomes and a poor work-life balance.
- Protection against sexual harassment and gender-based violence, especially in female-dominated occupations such as cleaning, reception, and food service. This is a cross-cutting issue that requires both contractual recognition (e.g., anti-harassment clauses in collective agreements) and workplace-level protocols for reporting and support. The issue was frequently raised during workshops in Cyprus and Valencia, particularly regarding the invisibility of cleaning staff in subcontracted structures.
- Access to affordable and decent housing, especially for seasonal and mobile workers in rural or high-tourism regions. In some Alpine or Mediterranean areas, workers are forced

to live in overcrowded or sub-standard conditions due to the lack of employer-provided accommodation. The Final Report and the Handbook recommend incorporating housing provisions into collective agreements, particularly for workers who are geographically dependent on employer facilities.

- Protection against informality, including legal support, whistleblower protections, and stronger institutional partnerships with labour inspectorates. In countries like Bulgaria or Slovakia, unions have experimented with information campaigns and anonymous reporting tools, although their reach remains limited without state support.

Geographic variation is significant. In Northern European countries with stronger welfare systems and more robust labour inspection (e.g., Denmark), these risks are often addressed preventively through tripartite collaboration and regulatory enforcement. By contrast, in many Southern and Eastern European Member States, unions are frequently forced into a reactive mode, providing legal aid or acting as intermediaries for grievance resolution, rather than being able to proactively shape employment standards.

However, the research also highlights a shift towards empowerment-oriented strategies. Increasingly, unions are incorporating not just protections but also opportunities for personal and professional development into their bargaining agendas. Training provisions – particularly those linked to recognised vocational pathways – are emerging as powerful tools for enhancing worker retention and confidence. In Italy, for instance, territorial agreements have begun to include training credits and certification modules that are portable across employers. These initiatives not only improve employability but also help to reframe the sector as a space for sustainable career development. Furthermore, partnerships with vocational training institutions and hospitality schools are proving to be effective strategies for bridging the gap between education and employment. These collaborations – documented in Spain and France

– enable unions to play an anticipatory role in workforce development, positioning themselves as facilitators of upward mobility rather than solely reactive defenders of rights. In summary, improving working conditions in the hospitality sector requires a dual approach: reinforcing legal protections and institutional mechanisms on one hand, while simultaneously promoting worker empowerment through education, representation, and career progression. The more unions succeed in aligning their strategies with workers' aspirations for stability and recognition, the more they can challenge the prevailing perception of hospitality as a low-status, high-turnover sector. The *Final Report* and associated practices confirm that where working conditions improve, so too does union legitimacy, density, and bargaining leverage.

INSTITUTIONALISING SOCIAL DIALOGUE

4

The architecture of social dialogue in the European hospitality and tourism sector is highly fragmented and context-dependent, reflecting divergent traditions of industrial relations, degrees of employer organisation, and levels of institutional support. While some countries benefit from structured and stable forms of bipartite and tripartite dialogue, others operate in environments characterised by weak coordination, informal bargaining, or a complete absence of dialogue mechanisms at the sectoral level.

In countries such as Italy, France, and Spain, long-standing traditions of institutionalised social dialogue have facilitated the development of robust mechanisms for cooperation between trade unions, employer organisations, and public authorities. These systems are supported by national and territorial collective bargaining structures and underpinned by the operation of bilateral bodies – jointly governed entities that provide services such as training, welfare benefits, and support for professionalisation. As highlighted in the *Final Report*, these bodies have also played a crucial role in responding to economic shocks, offering financial and logistical support during crises like the COVID-19 pandemic.

France, Spain, and Italy also serve as examples where sectoral-level dialogue is reinforced by multi-level governance: national collective agreements set overarching standards, while regional or company-level bargaining adapts provisions to local realities. These layered arrangements enable social partners to address both structural and contingent challenges, such as seasonal labour shortages, training gaps, or the regulation of specific job profiles. The effectiveness of these systems is partly due to the relatively high level of employer organisation in the sector and the institutional legitimacy of the unions involved.

Conversely, in liberal market economies like the United Kingdom, and in many Eastern European countries such as Slovakia, the institutional infrastructure to support social dialogue is either underdeveloped or absent. The *Final Report* documents how, in these contexts, unions often lack a recognised counterpart for sectoral negotiation, and public authorities rarely take an active role in promoting structured dialogue. The fragmentation of employer representation and the predominance of SMEs further complicates the ability to aggregate interests and conduct effective bargaining.

Despite these structural barriers, unions in weaker institutional environments have explored innovative strategies to recreate forms of dialogue. One such approach – emerging from fieldwork conducted in Cyprus, Czechia, and Romania – involves the establishment of multi-stakeholder coalitions, where unions collaborate with NGOs, municipal administrations, training providers, and occasionally with chambers of commerce or tourism bodies. These informal platforms enable joint problem-solving on issues such as training, housing for seasonal workers, and youth employment, even in the absence of formal collective bargaining.

Such hybrid arrangements were discussed extensively during the transnational workshops of the *Stronger Hospitality* project. Participants from countries with limited institutional frameworks shared experiences of building localised partnerships as an alternative route to influence labour market conditions. In Cyprus, for example, unions reported engaging with regional actors to develop vocational programmes and promote tourism careers among young workers. In Czechia, informal dialogue forums allowed unions to push for basic protections in catering services subcontracted by larger institutions.

Another insight from the research is that employer engagement is a decisive factor. Where employers are organised and perceive unions as credible interlocutors – often due to prior cooperation or visible contri-

butions to workforce development – dialogue tends to be more stable and productive. In countries with fragmented employer representation, unions often take on additional roles, such as convening dialogue spaces or facilitating joint projects, in order to compensate for institutional gaps.

Ultimately, the institutionalisation of social dialogue in the hospitality sector depends on both structural conditions – such as legal frameworks, the strength of employer associations, and public policy – and the strategic agency of unions. Where formal mechanisms are weak, unions can still build legitimacy through action: developing training offers, delivering services, or participating in local economic planning can all serve to create platforms for future dialogue.

The *Final Report* recommends strengthening social dialogue through both top-down and bottom-up measures: promoting legal provisions that facilitate bargaining, encouraging employer aggregation, and investing in the capacity of unions to engage effectively at multiple levels. In doing so, even highly fragmented systems can gradually develop more resilient and responsive models of industrial relations adapted to the complexity of the hospitality and tourism sector.

CROSS-BORDER AND SUPRA-NATIONAL COORDINATION

5

The hospitality and tourism sector is increasingly embedded in transnational dynamics shaped by global supply chains, franchising systems, and the cross-border mobility of both businesses and workers. This internationalisation creates regulatory asymmetries and enforcement challenges that exceed the scope of national labour regimes. Fragmented jurisdiction, varied legal protections, and limited mechanisms for cross-border enforcement place mobile and precarious workers – particularly those employed through subcontracting or platform-based arrangements – at heightened risk of exploitation. Against this backdrop, cross-border and supranational coordination among trade unions emerges as both a necessity and a strategic frontier for strengthening worker protection.

The *Final Report* and the *Handbook* highlight that cooperation across national trade union organisations is especially critical in addressing the regulatory gaps related to mobile workers, temporary agency labour, and multinational hotel chains. These business models often operate across multiple legal frameworks, complicating both

union representation and the applicability of collective agreements. Where national instruments fall short, coordinated union action at the European level provides a platform for advocacy, monitoring, and collective bargaining.

One of the most promising tools identified by the project is the development of transnational framework agreements (TFAs), particularly those negotiated by the IUF (International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations). These agreements, concluded with major multinational companies such as AccorInvest, Meliá Hotels, Riu Hotels, and Sodexo, set minimum standards across several countries on issues such as occupational health and safety, the prevention of sexual harassment, and fair digital transition. These TFAs serve as a reference for national affiliates and a strategic entry point for dialogue with employers who operate across borders.

However, the implementation of such agreements remains contingent on institutional follow-up and the capacity of national unions to

adapt them to local regulatory contexts. The *Final Report* highlights that where local structures are weak, the practical effects of TFAs may be limited unless accompanied by training, monitoring, and feedback mechanisms that facilitate their application on the ground. In this regard, EFFAT plays a vital infrastructural role, acting as a bridge between European-level commitments and national-level operationalisation.

Beyond formal agreements, the *Stronger Hospitality* project itself functioned as a platform for comparative learning and strategic recalibration. Through transnational workshops and peer-to-peer exchanges, trade union representatives from Northern, Southern, Central, and Eastern European countries had the opportunity to observe and adapt practices from countries with stronger institutional frameworks. These exchanges were not merely informative but enabled concrete strategic shifts, such as investing in youth-oriented campaigns, experimenting with digital organising tools, or rethinking training delivery in fragmented contexts.

Moreover, the project reinforced the importance of building horizontal trust between trade unions across borders. Participants emphasised that shared challenges – ranging from labour shortages and digitalisation to corporate restructuring – require coordinated responses that transcend national specificities. EFFAT's convening role in these exchanges is therefore not only func-

tional but strategic, helping to construct a shared European agenda for the sector.

Finally, the capacity for cross-border coordination is intimately linked to the existence of supportive infrastructure. Organisations like EFFAT are critical in standardising data collection, aligning advocacy strategies, and facilitating joint campaigns. Their role in the EU-level Sectoral Social Dialogue Committee for HORECA and their advocacy work also ensures that the voices of hospitality workers are heard in policy discussions at the European Commission level.

In sum, the findings of the *Final Report* suggest that cross-border and supra-national coordination is not a peripheral concern but a structural necessity in a sector marked by mobility, asymmetry, and rapid transformation. Developing more binding instruments at EU level, strengthening the capacity of unions to monitor global actors, and investing in platforms for regular transnational exchange will be essential to shaping a fairer and more coherent labour regime for Europe's hospitality workforce.

CONCLUSION AND DISCUSSION

The findings of the *Final Report* offer a comprehensive, multi-layered picture of trade unionism in the European hospitality and tourism sector. While this sector remains structurally vulnerable and institutionally fragmented in many contexts, it also emerges as fertile ground for strategic experimentation and organisational renewal. The project's combination of fieldwork, peer exchange, and comparative analysis confirms that trade unions across Europe are facing common challenges – yet are responding to them with increasingly innovative, context-sensitive strategies.

Structural constraints persist throughout the EU, particularly in the form of workforce instability, limited bargaining coverage, and the weak or uneven organisation of employer counterparts. These issues are especially pronounced in Eastern European Member States, where trade unions often contend with liberalised labour markets, low institutional density, and a lack of supportive public policy frameworks. The absence of sectoral employer associations in many of these contexts further exacerbates fragmentation, forcing unions to rely on enterprise-level negotiation or alternative, informal forms of dialogue.

At the same time, the research reveals significant opportunities for innovation. Unions have demonstrated adaptability by experimenting with new outreach methods, including digital tools, multilingual campaigns, and youth-targeted organising strategies. In contexts where institutional support is weak, unions have redefined their role by engaging in partnerships with NGOs, municipalities, and training providers – creating hybrid forms of representation and influence. These practices are particularly relevant in countries such as Cyprus, Czechia, and Romania, where traditional forms of collective bargaining have proven difficult to sustain.

A key insight from the project is the importance of geographic and institutional differentiation. Countries with coordinated industrial relations systems offer a more favourable environment for stable collective bargaining, policy influence, and the institutionalisation of social dialogue. In these systems, trade unions benefit from structured bargaining frameworks, mechanisms for agreement

extension, and functioning bilateral bodies. Conversely, in liberal regimes or post-socialist transitions, unions are often forced to adopt a more adversarial and resourceful stance, relying on litigation, mobilisation, or project-based interventions to exert influence.

Crucially, the practices identified throughout the project – ranging from transnational framework agreements to peer-to-peer training and vocational certification within collective agreements – are not isolated experiments. They form part of a broader emerging repertoire of strategic responses to the evolving political economy of hospitality work. This repertoire reflects a shift from purely defensive strategies to a more assertive, multidimensional trade unionism: one that combines protection with empowerment, negotiation with innovation, and national with transnational engagement.

The *Stronger Hospitality* project also underscores the importance of cross-border coordination. Given the transnational nature of the sector – characterised by mobile workforces, global hotel chains, and digital platforms – national-level responses are increasingly insufficient. The role of European trade union federations such as EFFAT, and instruments like transnational framework agreements, will be crucial in setting baseline standards, enhancing mutual learning, and ensuring that unions can act collectively across borders.

For policymakers, the lessons are clear: enabling trade union effectiveness in the hospitality and tourism sector requires legal frameworks that support collective bargaining, institutionalised social dialogue platforms, and investment in the capacity of social partners. Policymaking at EU and national levels must recognise hospitality not as a peripheral or low-skilled sector, but as a strategic space for inclusive growth, social cohesion, and innovation in industrial relations.

For trade unions, the path forward lies in diversifying tactics, investing in internal capacity, and building multi-level alliances. Strategies that combine proximity (local and workplace-level engagement) with transnational leverage (European coordination, shared tools, and advocacy) are more likely to succeed in transforming working conditions and increasing representativeness.

Readers are encouraged to consult the *Final Report* for a detailed account of the project's methodology, empirical findings, and comparative insights, and to refer to the *Handbook* for a structured presentation of practices, tools, and recommendations aimed at enhancing union capacity and influence across Europe's hospitality and tourism sector.

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Note on the Use of Artificial Intelligence

Some of the photographs and illustrations featured in this material were created or enhanced using generative artificial intelligence tools, with the aim of ensuring visual consistency, inclusive representation, and high-quality imagery.

All AI-generated visuals were manually curated and validated to reflect the values of dignity, multiculturalism, and professionalism that are central to EFFAT's identity.

The use of artificial intelligence was strictly limited to visual and communicative purposes and does not imply any reproduction of, or reference to, real individuals.



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