



Policy Department Structural and Cohesion Policies

STANDARDISATION AND QUALITY LABELS FOR EU TOURIST SERVICES

TRANSPORT AND TOURISM



EUROPEAN PARLIAMENT

Directorate General Internal Policies of the Union

Policy Department Structural and Cohesion Policies

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FOR EU TOURIST SERVICES**

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This note provides an overview of existing quality standards and labels within the EU, with an assessment of the potential for European wide schemes. The focus is on accommodation and on quality labels for hotels, but other elements of tourism are also discussed.

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EXECUTIVE SUMMARY

This note provides an overview of existing quality standards and labels within the EU, with an assessment of the potential for European wide schemes. The focus is on accommodation and on quality labels for hotels, but other elements of tourism are also discussed.

Existing quality standards and labels include:

- Accommodation classification schemes, adopted in differing forms in all member states with the exception of Finland;
- International Standards Organisation (ISO) standards;
- Eco-labels, for which there is an EU wide standard scheme;
- Quality systems, such as the ‘Q’ mark available to the tourism industry in Spain and Quality 1000 in Finland.

The accommodation classification schemes vary from those that are entirely under the wing of government to those that are designed and operated by national hotel associations. Trends are for an increase in public/private partnerships and for the inclusion of service standards as part of an assessment.

The introduction of a pan European accommodation classification scheme would provide consistent information for the consumer across the EU, but would represent a substantial challenge in terms of implementation. An outline typology for such a scheme is presented in this paper. Bringing such a scheme to fruition would need the co-operation of the private sector, and national hotel associations are generally opposed to such a scheme on the grounds that it would be undesirable and very difficult to implement.

Other possibilities include:

- The wider establishment of ‘Q’ quality service standards across the EU, both as a supplement to accommodation classification schemes and to extend a quality label to other parts of the tourism industry. Models exist in Finland, Spain and Switzerland (as adopted by entities within the EU).
- The provision of easily comparable information on the characteristics of existing accommodation classification systems in the EU, via a well publicised website, aimed at both the travel trade and the general public.
- The promotion and wider use of the European eco-label, as already established under the auspices of the European Commission.
- The encouragement of cross border co-operation among member states with regard to accommodation classification schemes, as already pioneered by Benelux countries and Nordic member states. This could lead to the greater alignment of accommodation classification schemes within the EU in the longer term.

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1. INTRODUCTION AND RATIONALE

1.1. Introduction

Europe is the world's leading tourist destination. Nonetheless, with the rise in market share of emerging destinations, Europe's relative position is at risk. Given that the tourism sector is one of the most important in the European Union (EU), contributing to economic growth and employment creation, member states have a strong incentive to strengthen its leadership position.

The delivery of high quality tourism products is likely to be increasingly important in influencing travel behaviour. The majority of EU member states have chosen to adopt quality standards and labels programmes to improve the quality of their tourism product. However, these quality standards and labels are far from being unified. In this note the potential standardisation of quality systems at EU level is considered.

The note gives an overview of existing quality standards and labels within the EU. A typology is developed, with a discussion of the advantages and disadvantages of the current situation for the tourism industry and for consumers. The potential for European wide schemes is discussed.

1.2. Measuring quality in tourist services

1.2.1. Scope

There are various mechanisms aimed at delivering quality in EU tourism services. They cover, for example:

- Air transport, including safety measures and reliability;
- Coach travel, including maximum speed and drive time limits;
- Beach quality, to meet the requirements of Council Directive 76/160/EEC on Bathing Water Quality;
- Tour operation, notably via the Council Directive 90/314/EEC on Packaged Travel.

The focus of this note is on accommodation and on quality labels for hotels. This component of the tourism industry has seen most effort at establishing quality labels. The Directive on services in the internal market (Directive 2006/123/EC) requires the strengthening of the rights of consumers as users of services, with specific mention of its importance in tourism, especially the hotel business.

1.2.2. Rationale

The two main reasons for establishing quality labels for accommodation via some form of classification scheme, are to:

- Inform Consumers, enabling an informed choice to be made that is based on some measure of quality;
- Encourage investment and quality improvement by setting a standard that owners seek to reach and maintain.

Classification schemes can also be used for other purposes, such as price control or as a means to apply differential taxation. Both of these have been applied in the EU.

1.2.3. Forms of measurement

Two forms of measurement are commonly used:

- Physical measures, also called infrastructure standards – examples are the size of rooms and the nature of the facilities offered. These are relatively easy to measure;
- Quality of service. This is more subjective and more challenging to measure.

If quality of service is used as a measure, this can be combined with physical attributes to provide an overall quality assessment.

1.2.4. Participation

Quality standards and labels programmes may be voluntary or compulsory. Both approaches are currently taken within the EU.

2. EXISTING QUALITY STANDARDS AND LABELS IN THE EU

2.1. Overall characteristics

2.1.1. Star classification system

The Star classification system is most widely used internationally and within the EU. Despite this, there is no international standard and classification schemes are not consistent from one EU member states to another. Information on the various schemes is given in Annex 1. Finland is distinctive in being the one EU member state without any official accommodation classification system at national level.

There are initiatives already in place to standardise accommodation classification within particular regions. The Benelux countries have developed a scheme that employs the same criteria. Sweden, Denmark, and Aland Island (Finland) have sought to harmonise their criteria to implement a Nordic hotel classification scheme. The three Baltic States (Estonia, Latvia, and Lithuania) aim to harmonise the criteria of their national hotel classification scheme with a link to the Nordic classification. In due course, these six member states will have the same minimum criteria and signage.

2.1.2. Private sector initiatives

In addition to government sponsored official hotel classification systems, international hotel chains and tour operators have developed their own criteria to classify hotels according to different categories, using stars or other indicators as a measure of quality.

International hotel chains have devised their own categorisation standards which different brands within their portfolio are expected to meet. Private sector organisations, of which a notable example is Michelin¹, have developed their own classification system for hotels and restaurants. They conduct their own inspections and publish the results. Tour operators have devised schemes for accommodation classification that, unlike official national schemes, are broadly compatible across borders. For example, First Choice in the UK operates a 2 to 5 ‘sun’ classification, based on the company’s own inspections. They do note that accommodation of similar ratings, but in different countries, cannot always be directly compared.

The UK Federation of Tour Operators² (directly linked to the International Federation of Tour Operators) operates a preferred code of practice that incorporates fire and food safety, aspects that do not feature within conventional accommodation classification schemes. The importance of such codes has been highlighted at various times, such as in 2006 when two British children died as a result of carbon monoxide poisoning at a 4-star resort in Greece. The source of the poisoning allegedly did not feature within the current code of practice since it was external to the building.

In recent years customer satisfaction rating system websites have emerged as a new international classification model. A leading example is tripadvisor.com, a travel website that gives information and advice, with accommodation ratings that are ostensibly based on consumer opinions as submitted to the site. The site claims a content of more than 5 million reviews and

¹ The Michelin tyre company describes their European Hotel Guides as ‘the benchmark for hotel accommodation and restaurants’. These cover France, Germany, Ireland, Italy, Portugal, Spain and the UK. (www.michelin.com).

² www.fto.co.uk.

opinions and some 20 million site visitors a month. It is owned by the same company as the expedia.com and hotels.com travel agency websites.

2.1.3. International Standards Organisation

The International Standards Organisation (ISO) is in charge of developing and maintaining the portfolio of technical international standards. ISO 18513 deals with the terminology of tourism services – hotels and other type of accommodation. The ISO 9000 (quality management) and ISO 14000 (environmental management) are other series of standards that have been adopted in many other sectors than tourism to improve the quality of service delivery. Most national hotel associations oppose the application of such ISO standards as a management system certification for tourism services; given the cultural differences of the member states, they believe that tourism services should not be the object of ISO norms.

2.1.4. Eco-Labels

Eco-labels have increasingly been established. The first labels to be developed were originally “green labels”, aimed at improving the environmental management of hotel establishments but have since extended to other sectors of the tourism and travel industry.

Examples are the Tour Operators Initiative (TOI)³ and Blue Flag⁴. The former acknowledges responsible tour operators who minimise their negative environmental, social and economic impacts while Blue Flag aims at improving the environmental quality of beaches and marinas in line with the Council Directive⁵.

More than 50 eco-labels have been identified among EU member states and concern different target groups (accommodation, recreation/sport facilities, travel companies and destinations). A more detailed list of relevant eco-labels programmes in place in the EU member states can be found in Annex 2.

The European Eco-label for tourist accommodation service and camp site service established in 2003/4 is a common scheme at EU level⁶. This attempts to encourage accommodation services to respect the environment by meeting strict minimum standards. In return, the certified establishment can use a flower logo to inform their customers about their environmental performance.

2.1.5. Overall Quality Systems

Directorate General Enterprise of the European Commission has undertaken a number of studies in relation to Integrated Quality Management (IQM) for tourism. In 2003 it published a Manual for Evaluating the Quality Performance of Tourist Destinations and Services⁷. The Manual puts forward a tool, named ‘QUALITEST’, to monitor the overall levels of tourism quality at

³ Tour Operators Initiative, www.toinitiative.org, operating in association with the UN World Tourism Organisation.

⁴ Blue Flag, www.blueflag.org, is run by the Foundation for Environmental Education. All EU member states with a sea coastline have Blue Flag beaches and marinas with the exception of Malta.

⁵ Council Directive 76/160/EEC of 8 December 1975 concerning the quality of bathing water.

⁶ European Union Eco-label, http://ec.europa.eu/environment/ecolabel/index_en.htm.

⁷ European Commission, DG Enterprise, A Manual for Evaluating the Quality Performance of Tourist Destinations and Services, Brussels, 2003.

a destination. If adopted this allows the monitoring of progress over time and for individual enterprises to benchmark their performance against others within the same sub-sector.

At member state level, such comprehensive systems of quality in tourism destinations remain uncommon. Spain has developed a Spanish Tourist Quality Plan, covering tourist quality systems aimed at specific tourism businesses, enabling them to obtain a ‘Q’ mark from the Spanish Tourism Quality Institute (ICTE).⁸ This initiative of the Spanish government aims to bring about a competitive advantage for the country via the implementation of quality systems across the tourism industry. A second category of the Spanish scheme is aimed at the overall improvement of tourism destinations.

Finland has developed Quality 1000 with the objective of achieving common quality criteria for small and medium-sized tourism businesses, incorporating training, auditing via self-assessment and on-line benchmarking.⁹ The Quality Label for Swiss Tourism, under the brand ‘Quality-Our Passion’, has been awarded to some 20 enterprises and local tourism organisations within the EU, in Austria, Greece and Germany.¹⁰

Europe does not yet have the equivalent of the Qualmark system in New Zealand, a quality assurance licensing system that caters for all forms of tourism business, and which incorporates both accommodation classification and a quality label within a single scheme.¹¹ It is a government backed licensing system that caters for all tourism businesses in New Zealand. Accommodation is given a star grading and other tourism businesses are given a quality endorsement. The assessment incorporates measures of customer service, the standard of facilities, overall business operations, environmental and cultural considerations, general safety and welfare. A mystery shopper programme is an integral part of the scheme.¹²

2.2. Typology of quality standards

2.2.1. Responsibilities

The typology given below relates to schemes for classifying tourism accommodation.

Government-set standards, government inspection – in some EU member states, governments have the role of setting standards by which hotels will be classified and are also in charge of ensuring compliance. Member states that have opted for this form of hotel classification include Bulgaria, Portugal, Poland, Romania and Slovenia. Other cases are where the public sector tourism organisation takes responsibility, as in Cyprus and Malta.

Government-set standards, Private sector inspection – in this form of classification governments are in charge of defining the standards but are not involved in the certification process. National authorities either delegate the certification process to private companies or hire independent

⁸ Instituto para la Calidad Turística Española, www.ictes.es.

⁹ The Quality Thousand project operates under the aegis of the Finnish Tourist Board in co-operation with the Haaga-Perho Education and Research Centre. As of 2006, 500 tourist businesses were involved, with a target of one thousand participating companies.

¹⁰ The Swiss Quality Label is operated by the Swiss Tourism Federation, www.quality-our-passion.ch.

¹¹ Qualmark is owned by Tourism New Zealand and the New Zealand Automobile Association, www.qualmark.co.nz. A private sector, not for profit organisation, based in Devon, England, launched a Qualmark scheme for bed and breakfast and self-catering businesses in the UK in 2007 (www.qualmark.co.uk).

¹² Under a ‘mystery shopper’ programme, the service offered by an establishment is tested on an unannounced basis by an independent assessor.

inspectors to carry out the inspections under their direction. Greece and Ireland are examples of this form of classification.

Industry/ Association standards and inspection – in many countries the national hotel association sets classification standards. Austria, Czech Republic, Estonia, Denmark and Sweden have taken this route. This is often in conjunction with a national tourist board.

Public/private sector joint scheme – in the UK (except Northern Ireland), accommodation establishments are graded under a set of common quality standards agreed by three national tourist boards and private sector motoring organisations.

Private sector standards and inspection – these are exemplified by the Michelin guides and websites, the latter based to a significant degree on input by customers.

2.2.2. Quality of infrastructure v. quality of service

The majority of hotel classification schemes in the EU are based on infrastructure criteria, with physical features determining the quality standard. An example is that, in Poland, a five-star hotel is expected to have at least 30 beds, a lounge, one restaurant and two other catering establishments, and conference facilities. The size of the rooms has to be of at least 18m² for a single bedroom and 26m² for a double bedroom. The same minimum room sizes are applicable to five-star hotels in Germany and in Hungary. In contrast, in France, a four-star luxe hotel (the top category) needs to have a minimum of only 10 rooms in total, with room sizes of at least 10m² for a single room and 14m² for a double room.

The majority of EU member states appear to be reluctant to use quality of service criteria in their national classification hotel schemes as they are judged to be subjective. The aptitude and the politeness of staff are more difficult to evaluate and are thought to vary according to the inspector's expectations.

Some believe that the nature of services received should have greater weight in the criteria. For instance, small independent hotels which do not have the facilities required for a 4 or 5 star rating but who provide an excellent service cannot generally be recognised under existing classification systems. It is understood that this aspect underlies the reluctance of members of the Finnish Hotel Association to adopt an accommodation classification scheme.

2.2.3. Scheme Funding

Quality systems as indicated by accommodation classification can be funded:

- by the verification agency, i.e. from general taxation;
- by the accommodation operator/owner themselves

or via a combination of both means. All three mechanisms are in use in the EU.

2.2.4. Trends in Rating Systems

Recent trends in accommodation classification internationally have been:

- An increase in public/private partnerships, with a reduction in 'top-down' schemes with parameters set by governments and an increase in private sector participation in setting industry benchmarks and the private sector playing a lead role in implementation. This can include the contracting out of the operation of a scheme to a private entity.

- An increased emphasis on service standards, with inspections that go beyond the assessment of the standards themselves to assist management to attain these standards. This process requires a relatively high level of expertise on the part of the inspector.

2.3. Benefits and disadvantages for the tourism industry

It is beneficial to the tourism industry that the customer is provided in advance with an indication of what to expect, based on publicly accepted criteria. Quality standards assist in marketing both a destination and an individual property, and in reducing the likelihood of customer dissatisfaction and the payment of fines, as under the Package Travel Directive. Quality standards also work towards improving the competitiveness of both an individual tourism establishment and the destination as a whole. The prime disadvantage to the industry can be in terms of cost (including inspection fees and management time) and in terms of bureaucracy (e.g. if extensive form filling is required).

2.4. Benefits and disadvantages for the consumer

The provision of information for the consumer is a prime justification for accommodation classification schemes. The lack of any pan European standard, or any international standard apart from private sector schemes, undoubtedly limits this potential benefit. The involvement of consumer organisations in devising the existing schemes appears to be limited. That said, any mechanism that encourages quality improvements will be of benefit to the consumer. An ideal position for a consumer in the case of accommodation is that 'stars' indicate a quality around which he or she can make a "value for money" assessment on where they want to stay based on an impartial and independent assessment of a grading body.

3. WAY FORWARD AT EU LEVEL

3.1. A standardised classification scheme

From the point of view of the consumer, a standardised classification system that provides a consistent indicator of tourism product quality irrespective of the boundaries of individual member states must be beneficial. It can be argued that the nationals of individual countries have specific requirements that are reflected in national schemes, but this denies the degree of cross border travel.

In 1982 the Commission proposed a common Community wide grading of hotels. Discussions with HOTREC¹³ led to the adoption of Council Recommendation of 31 December 1986, 86/665/EEC, Standardized Information in Existing Hotels. This Recommendation noted "Whereas, because of the differing criteria applied at present, it has so far proved difficult to elaborate a hotel grading system at Community level but it would nevertheless be desirable to consider the possibility of doing so in future."

¹³ HOTREC, a confederation of national associations of hotels, restaurants, cafés, and similar establishments in Europe, is constituted under Belgian law as a not-for-profit association. Promoting and defending the interests of its membership vis à vis EU institutions is one of the key functions of the organisation.

3.2. The challenges in implementation

The challenges in devising any EU level classification scheme are very substantial. Among them are:

- Scheme compatibility: the formats of accommodation classification schemes across the EU are so varied that for any common scheme to be accepted some member states – and their tourism industries – would have to accept radical changes as compared to their existing schemes.
- Mode of operation: for any scheme to be practical it would have to be implemented at member state level, or at regional level within a member state. This would perforce require the participation of the tourism industry. At this juncture hospitality associations as represented by HOTREC have indicated their opposition to any form of pan EU accommodation classification scheme. Without such co-operation there would be a severe difficulty in bringing any pan EU scheme into effect, even if member states were prepared to support it. HOTREC is understood to be working on an umbrella quality scheme for use as a reference model at European level; it will not replace national/regional level classification schemes.

3.3. A pan European typology

Key elements of any EU wide accommodation classification scheme are likely to need to be as shown below:

Feature	Rationale
Classification criteria include both physical measures and an assessment of quality of service.	Responds to consumer assessment of their experience which takes in quality of service as well as physical attributes of a property.
Public/private sector agreement on scheme.	'Top down' setting of standards is insufficiently flexible.
Inspections carried out by skilled independent personnel, including 'mystery shopping'.	Generates consumer confidence in the robustness of the scheme.
Regular inspections, preferably annually.	Ensures system is up to date.
Star grading, 1 to 5 stars.	Generally understood internationally.
Participation is compulsory.	Ensures all accommodation is classified, and if minimum standards are not met that this is recognised.
Scheme funding to be determined nationally.	Provides flexibility in relation to decision of scheme funding.

Ireland has recently switched from a voluntary to compulsory system recognising that too many properties were outside the voluntary system.

The implementation of any such pan European system is as challenging today as it was in 1986. While some national systems are broadly in line with the indicated requirements, a substantial proportion is not. Areas of difficulty are likely to include whether a scheme should be mandatory or compulsory, with eight existing national schemes in the EU being voluntary. A second is likely to be the incorporation of quality of service measures in the classification criteria and a third is likely to be the detailed nature of the criteria themselves. While the majority of systems within the EU involve the private sector, government dominated schemes remain. Altering the position would, in some cases, require a change in national law.

3.4. Other possibilities

Alternatives to an EU wide accommodation classification system are the pursuit of International Standards or the implementation of a Quality mark. Essentially the ISO system relates to setting quality standards within a business in a way that provides limited information to the consumer. It also suffers from the disadvantage of any voluntary scheme, namely that those tourism enterprises most in need of quality improvement are often those who do not chose any form of certification.

The Quality mark can be an indication of quality of service that is in addition to the hotel classification system. This is the case in Spain, where the ‘Q’ mark, awarded under the ICTE, is an addition to the hotel classification system. Such a system could be extended to the EU as a whole. However, there would likely be some double counting where a national system already includes some measure of quality of service. It would also continue to suffer the disadvantage of a voluntary system of not being universal. An advantage of the Quality mark, as applied in Spain, is that it can be applied across the tourism sector and not just to hotels and other forms of accommodation.

3.5. Fostering collaboration between member states

One way forward is to foster co-operation on accommodation classification schemes between member states. This could be along the lines already underway between Denmark and Sweden and the Baltic States, and as has been the case in Benelux countries. The progressive extension of collaboration across national borders could lead to a series of pan European schemes that can progressively be aligned in order to give the consumer as consistent a picture of quality as is possible.

3.6. Eco-labels

The European Ecolabel for tourist accommodation service & camp site service¹⁴ is the only pan European tourism label in existence that is compatible across national borders.¹⁵ The review carried out in 2005 of the EU Eco-label scheme found that it has contributed towards higher environmental standards being achieved, and that the concept of an EU Ecolabel is preferred to national labels. It also found that there is low awareness of the ecolabel and that it suffers from bureaucratic procedures and organisational structures. Fees and costs are also perceived as barriers as is the lack of perceived public purchasing benefits. The Commission has undertaken a public consultation on the review and is to determine the best way forward for the EU Ecolabel. That it exists in parallel with national schemes does suggest that a wider application of European quality labels in the tourism industry is plausible.

Lack of public awareness is an issue for all eco-labelling schemes. Blue Flag beaches are now relatively well-known, a result of the efforts of the Blue Flag organisation itself and of government agencies and consumer organisations across the EU. National eco-labels for accommodation do not have the same awareness, partly because of their local nature and because they are not consistent with one another. In some cases they are promoted by

¹⁴ The European Ecolabel aims to reward tourist accommodation services (including camp site services) and tourists that respect the environment (www.ecolabel-tourism.eu).

¹⁵ Separate from the EU Ecolabel, the ‘Green Key’ eco label system is operating in 7 EU member states and is being developed in 5 more. Starting in Denmark in 1994, it is co-ordinated by the Foundation for Environmental Education (FEE) France and the Danish Green Key organisation (www.green-key.org).

environmental bodies with limited linkages to the mainstream tourism industry. It could be argued that the same issue relates to the EU wide label, in that the organisation responsible for implementation at member state level tends to be an environment ministry or agency that does not necessarily have strong links with the tourism industry in their particular jurisdiction. Awareness within the industry thus tends to be low, with resultant limited awareness on the part of customers. Improving linkages between environmental and tourism bodies should be addressed as part of the review of the EU eco-label.

3.7. Conclusions

There are a number of potential ways forward in relation to Quality Labels for EU Tourist Services. These are indicated in the table below.

Mechanism	Benefit to consumers	Impact on the tourism industry
Establishment of a pan European accommodation classification scheme that can be extended to other components of the tourism industry.	A consistent quality assessment scheme across the EU.	Substantial challenge in implementation and imposition of significant costs on the industry.
Application of ISO schemes to the tourism sector.	Benefits are indirect; no provision of quality information direct to the consumer.	Fosters minimum quality standards but with time and cost implications.
Information on different EU accommodation classification schemes provided on a clear and comparable basis via a well publicised independent website ¹⁶ .	Offers much improved understanding of what to expect.	Provides an opportunity to minimise potential customer dissatisfaction.
Wider establishment of 'Q' quality service standards across the EU.	Provides information on quality of service expectations, but may be confused in relation to existing classification schemes.	Encourages quality of service across the tourism industry on a voluntary basis.
Enhancement of eco-labels: an EU wide scheme exists and measures are being considered to improve its effectiveness.	Provides information on achievement of minimum environmental standards.	Encourages environmental responsibility on a voluntary basis.
Expansion of cross border co-operation in accommodation grading schemes.	Higher level of consistency across national borders than presently applies.	Need for agreement between differering agencies.
'Laissez faire': no action is taken at EU level.	National requirements are supposedly met within national schemes, but without consistency across borders.	Limited action required, but competitiveness of EU tourism industry may be reduced.

A conclusion is that the optimal way forward from a consumer point of view would be a pan European scheme that integrates quality of service measures with physical criteria, and that can be extended beyond the accommodation sector, in much the same way as the New Zealand Qualmark scheme. However, this is fraught with difficulty, and, even if agreed, would take a substantial time to implement. It is questionable as to whether the high cost is justified in relation to the benefit that would arise.

¹⁶ HOTREC offers information on hotel classification systems within the EU on its website, but the information is not available for all EU member states. The information that is available is provided in a mixture of languages and is not provided in a comparable way. This prohibits the consumer from easily finding out what the similarities and differences are. The availability of the information is not well publicised and is difficult to find.

An alternative is to promote the expansion of the 'Q' mark across the EU. Relatively few member states have adopted such a scheme to date. The challenge is to see if the existing schemes, as in Finland and Spain, could be integrated in such a way as to encourage adoption beyond these member states.

A further possibility is to promote the wider use and public understanding of the European eco-label. This has the benefit that it is an EU wide scheme that already exists. As it grows and expands it has the potential to encourage co-operation between member states and companies beyond the immediate environmental field, which could lead to enhanced co-operation on the alignment of accommodation classification schemes between member states. The encouragement of such co-operation as pioneered in Benelux countries and in Nordic member states would be of significant value to the consumer.

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ANNEXES

Annex 1: Hotel classification in EU Member States

Country	Official hotel classification	Level	Voluntary or mandatory	Designed by	Controlled by	Frequency of controls	Star cat.	Physical criteria/Service quality	Comments
Austria	Yes	National	Voluntary	Austrian Professional Hotel Association (www.hotelsterne.at)	Austrian Professional Hotel Association	Every 2-3 years for 4 and 5 stars hotels; 3-4 years for hotels with less stars	1 to 5	Physical criteria and quality of service	
Belgium	Yes	National (Benelux)	Compulsory	National Public authorities and hotel associations' (www.http://www.juridat.be/cgi_loi/loi_F.pl?cn=2000100540)	Regional Public Authorities	One-2 times a year	1 to 5	Physical criteria	Common criteria with Luxembourg and the Netherlands
Bulgaria	Yes	National	Compulsory	State Agency for Tourism (SAT)	State Agency for Tourism (SAT)	Annually	1 to 5	Both physical and quality standards	
Cyprus	Yes	National	Compulsory	Cyprus Tourism Organisation (www.kypros.org)	Cyprus Tourism Organisation	Every 2 years	1 to 5	Physical criteria	
Czech Republic	Yes	National	Voluntary	Czech National Federation of Hotel and Restaurants (nfr.cz)	Czech National Federation of Hotel and Restaurants	Every 2 years	1 to 5	Physical criteria	
Denmark	Yes	National	Compulsory for their members	Classification board (Danish Tourism Board and Danish professional Association- HORESTA)	HORESTA (www.dkhotellist.com/infogluDeliverLive/about_hotel.dk/Classification?languageId=1)	Annually	0 to 5	Both physical and quality standards	Project of implementing a Nordic and Baltic hotel classification system/ phase of promotion and harmonisation of signage
Estonia	Yes	National	Voluntary	Estonian Hotel and Restaurant Association (www.ehrl.ee/ www.starhotels.ee)	Members of classification committee and experts	Every 3 years	1 to 5	Both physical and quality standards	Project of implementing a Nordic and Baltic hotel classification system
Finland	No						No star classification		Hotel chains have their own classification system
France	Yes	National	Voluntary	National Public authorities/ professional associations: www.finances.gouv.fr/ http://umih.fr/classement-hotels/THE_FRENCH_CLASSIFICATION_S.pdf	Ministry of Finance/ Competitiveness and Consumption Service	Once during the demand of classification	0 to 4 - 4 luxe	Physical criteria	Negotiation to implement a new classification system where the national authority will delegate its power to industry/association
Germany	Yes	National	Voluntary	DEHOGA (www.hotelsterne.de)	DEHOGA through its regional associations	Every 3 years	1 to 5	Physical criteria/few quality standards	Room and service criteria are similar to the Danish system/ new criteria will be defined in 2009
Greece	Yes	National	Compulsory	Greek National Tourism Organisation (www.gnto.org)	Private or public duly certified organisations	Annually	1 to 5		
Hungary	Yes	National	Compulsory	Ministry of Local Government and Regional Development/ Hungary Hotel Association (www.hah.hu)	Local Municipality	Not regulated	1 to 5	Physical criteria/ Some quality standards	
Ireland	Yes	National	Voluntary/ compulsory in 2008	Tourist Board/ Irish Hotel Federation (http://www.failteireland.ie/Developing-Enterprises/Quality---Standards/Classification-Scheme.aspx)	Tourist board/ contract out private companies each 3 years	Annually	1 to 5	Physical criteria	New classification scheme being introduced
Italy	Yes	regional	Compulsory	Regional Public Authority	Region via Local Authority	Every 5 years	1 to 5	Physical criteria	
Latvia	Yes	national	Voluntary	Latvian Hotels and Restaurant Association/ State organisations (www.lvra.lv)	Hotel and restaurants Centre (private company)	Annually	1 to 5	Physical criteria	Project of implementing a Nordic and Baltic hotel classification system

Standardisation and quality labels for EU tourist services

Country	Official hotel classification	Level	Voluntary or mandatory	Designed by	Controlled by	Frequency of controls	Star cat.	Physical criteria/Service quality	Comments
Lithuania	Yes	National	Compulsory	Committee of Tourist Board and Hotel and tourism professional associations	Tourist Board	Every 3 years	1 to 5	Based on technical factors/ some service quality	Project of implementing a Nordic and Baltic hotel classification system (meetings twice a year)
Luxembourg	Yes	National	Compulsory	National Public authorities and hotel associations' (www.horesca.lu)	National Public authorities	One-2 times a year	1 to 5	Physical criteria	Common system with Begium and the Netherlands
Malta	Yes	National	Compulsory	Malta Tourism Authority	Malta Tourism Authority (www.maltatourism.com)	Annually	2 to 5	Physical criteria	
Netherlands	Yes	National	Compulsory	KHN/ Board of the Horeca Sector	Bedrijfschap Horeca (the board consists of employers and employee associations, www.hotelsterren.nl)	Every 2 years	1 to 5	Physical criteria	Common system with Begium and the Netherlands
Poland	Yes	National	Compulsory	Ministry of Infrastructure	Regional Public Authority (mgpips.gov.pl/ www.hotelarze.pl/en/index.php)	Every 2 years	1 to 5	Physical criteria	
Portugal	Yes	National	Compulsory	National Public Authority (Ministry of Economy)	General Board of Tourism (DGT; www.dgtourismo.pt)	Every 3 years	1 to 5	Physical and quality criteria	
Romania	Yes	National	Compulsory	Ministry of Small & Medium Sized Companies, Trade, Tourism and Liberal Professions	Ministry of Small & Medium Sized Companies, Trade, Tourism and Liberal Professions	Every 3 years	1 to 5		
Slovenia	Yes	National	Compulsory	Directorate of Tourism, Ministry of Economy	Directorate of Tourism, Ministry of Economy	Every three years	1 to 5	Physical criteria	
Slovak Republic	Yes	National	Mandatory	National Public Authority (http://www.zbierka.sk/zz/predpisy/default.aspx?ro=2001&cc=172)	Hotel self-assessment	Annually	1 to 5		
Spain	Yes	Regional (17 regions)	Compulsory	Regional Public Authority	Regional Public Authority	Annually	1 to 5, Luxe and Grand Luxe in some regions	Quantity and quality standards	
Sweden	Yes	National	Voluntary	Swedish Hotel Restaurant Association (SHR; www.hotelsinsweden.com)	Swedish Hotel Restaurant Association (SHR)	Every 5 years	1 to 5	Quantity/few quality standards	Project of implementing a Nordic and Baltic hotel classification system
UK	Yes	National	Voluntary	Co-ordinated system of Visit Britain (England), Visit Scotland, Visit Wales, AA & RAC	AA, RAC, tourist boards (www.tourismtrade.org.uk/spotlightstory/qualitystandards.asp)	Annually	1 to 5	Physical measures and service quality	

Sources: HOTREC (www.hotrec.org), UNWTO, Original research

Annex 2: Examples of Eco-label programmes in EU Member States

Country	Blue Flag: www.blueflag.org			Accommodation eco-labels	PAN PARKS: www.panparks.org
	Blue Flag	Number of Beaches	Number of Marinas		
Austria	n/a	n/a	n/a	Visit Das Österreichische Umweltzeichen für Tourismusbetriebe (www.umweltzeichen.org)	
Belgium	Yes	6	6	Entreprise-Eco-dynamique/ Gîte Panda Belgique/ Label Vert (www.ftlb.be)	
Bulgaria	Yes	12	0		Yes- Central Balkan National Park/ Rila National Park
Cyprus	Yes	49	0		
Czech Republic	n/a	n/a	n/a		
Denmark	Yes	211	77	Green Key/ Visit Den Gronme Nogle/Blaue Schwalbe (www.dengroennenogle.dk)	
Estonia	Yes	2	4	Green Key (http://visitestonia.com/public/files/krit_eng.pdf)	
Finland	Yes	6	30		
France	yes	269	84	Green Key/ Hotel au Naturel: (www.tourisme-vicbilh.fr)	Yes- Oulanka National Park
Germany	yes	39	123	Bayerisches Umweltsiegel für Tourismusbetriebe/ Bett&Bike - Fahrradfreundliche (www.bettundbike.de)	
Greece	yes	411	15		
Hungary	n/a	n/a	n/a		
Ireland	yes	81	3		
Italy	yes	216	52	Legambiente Turismo (www.lagumbienturismo.it)/ Blu Garda/ Cavalluccio Marino/ Green Key hotel/ Guida Agriturismo Bioecologici (www.aiab.it)/ Valigia Blu	Yes- Majella National Park
Latvia	yes	6	1	Green Certificate (www.eco.celotas.lv)	
Lithuania	yes	6	0	Green Key (www.green-key.org)	
Luxembourg	n/a	n/a	n/a	Visit Ecolabel Luxemburg (www.emweltzenter.lu)	
Malta	current (blueflag)			Eco-certification scheme (www.maltatourismauthority.com)	
Netherlands	yes	40	45	VISIT MilieuBarometer (www.milieubarometer.com)	
Poland	yes	2	3		Yes- Bieszczady National Park
Portugal	yes	207	11		
Romania	yes	8	1		Yes- Retezat National Park
Slovenia	yes	8	2		
Slovak Republic	n/a	n/a	n/a		
Spain	Yes	480	2	VISIT El Distintivo de Garantía de Calidad Ambiental (www.gencat.es/mediamb/)/ Alcudia - Municipio Ecoturístico (www.alcudia.net)/ Biosphere Hotels - Quality for Life (biohotel.com)	
Sweden	Yes	45	58	Green Key (www.green-key.org)	Yes- Fulufjället National Park
UK	Yes	144	11	VISIT Green Tourism Business Scheme (www.green-business.co.uk)	

Source: Voluntary Initiative for Sustainability in Tourism (VISIT), www.visit21.net

Note: PAN Parks is an initiative of the World Wildlife Fund in partnership with the Dutch leisure company, Molecaten. The PAN Parks logo aims to be a trademark for outstanding nature and high quality tourism facilities, balanced with the needs of wilderness protection and community development.

