

# ANNUAL REPORT 2021

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# WORD FROM THE PRESIDENT

Dear colleagues,

It has been a pleasure to see so many colleagues, industry partners, policy decision-makers come together for ECTAA's 60th anniversary celebrations in Brussels and talk about the recovery of our industry. But the path to recovery is fraught with uncertainty. Despite the roll-out of vaccinations and the introduction of the EU Digital Covid Certificate, which has been a key enabler for European travel this summer, the arrival of a new variant, Omicron, is a set-back for the industry and travellers, as governments rush to reinstate mobility restrictions. ECTAA's focus continues on bringing the industry back on track of recovery and improve resilience to future shocks.

Together with other travel and tourism stakeholders we reiterate our calls for continued support to the industry, a European common approach on travel restrictions and public health protocols that is based on strong evidence of benefits and a legislative environment that is conducive to a quick recovery and long-term sustainable growth.

2022 will be a crucial year. We are mid-way through the very ambitious Commission programme of the twin green and digital transition. A package of legislative initiatives are expected to be adopted next year that will impact the travel and tourism industry. We invite you to read our Annual Report to see, what we have achieved this year, what is in the pipeline for our industry and where we will have to set our priorities for the next couple of years.

We take this opportunity to thank our Members for their support and collaboration and look forward to better times for our industry.

*Pawel Niewiadomski*

**PAWEŁ NIEWIADOMSKI**

PRESIDENT

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*The ECTAA secretariat would like to thank Estelle Dubar for her creative input and constant efforts in producing this annual report.*



ECIAA 60

1961-2021

ECIAA

THE EUROPEAN TRAVEL AGENTS'  
AND TOUR OPERATORS' ASSOCIATIONS

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# POLITICAL Achievements



# COVID-19 TRAVEL RESTRICTIONS



***"In July 2021 the total passenger volume more than doubled compared to July 2020"***

The priority of ECTAA has been to allow travel and tourism to start-up again. It has formed a number of alliances with other European and international travel and tourism stakeholders to amplify the message to decision-makers: we need harmonised travel rules, lift travel restrictions as vaccinations are progressively rolled-out and move from a broad country-risk approach to a more specific traveller-risk approach.

Collectively we have contributed to the elaboration and pushed for the speedy adoption and implementation of the EU Digital Covid Certificate (DCC), which is a harmonised system for the issuance and mutual recognition of certificates proving that a person has either been vaccinated, recovered from Covid-19 or has received a negative test result. This has enabled to move to a traveller-risk approach, as a person who has a valid DCC is not subject to additional travel restrictions, save exceptional circumstances such as the emergence of new Covid-19 variants of concern. It has effectively helped to reboot European travel just in time for the summer season. Airports Council International reported that in July 2021 the total passenger volume more than doubled compared to July 2020, which it attributes to the rollout of the EU DCC along with the easing of travel restrictions.

20 EU Member States also use the EU DCC for domestic purposes, such as for the access to large events and restaurants, cinemas and museums, which should facilitate tourists to access these places as well.

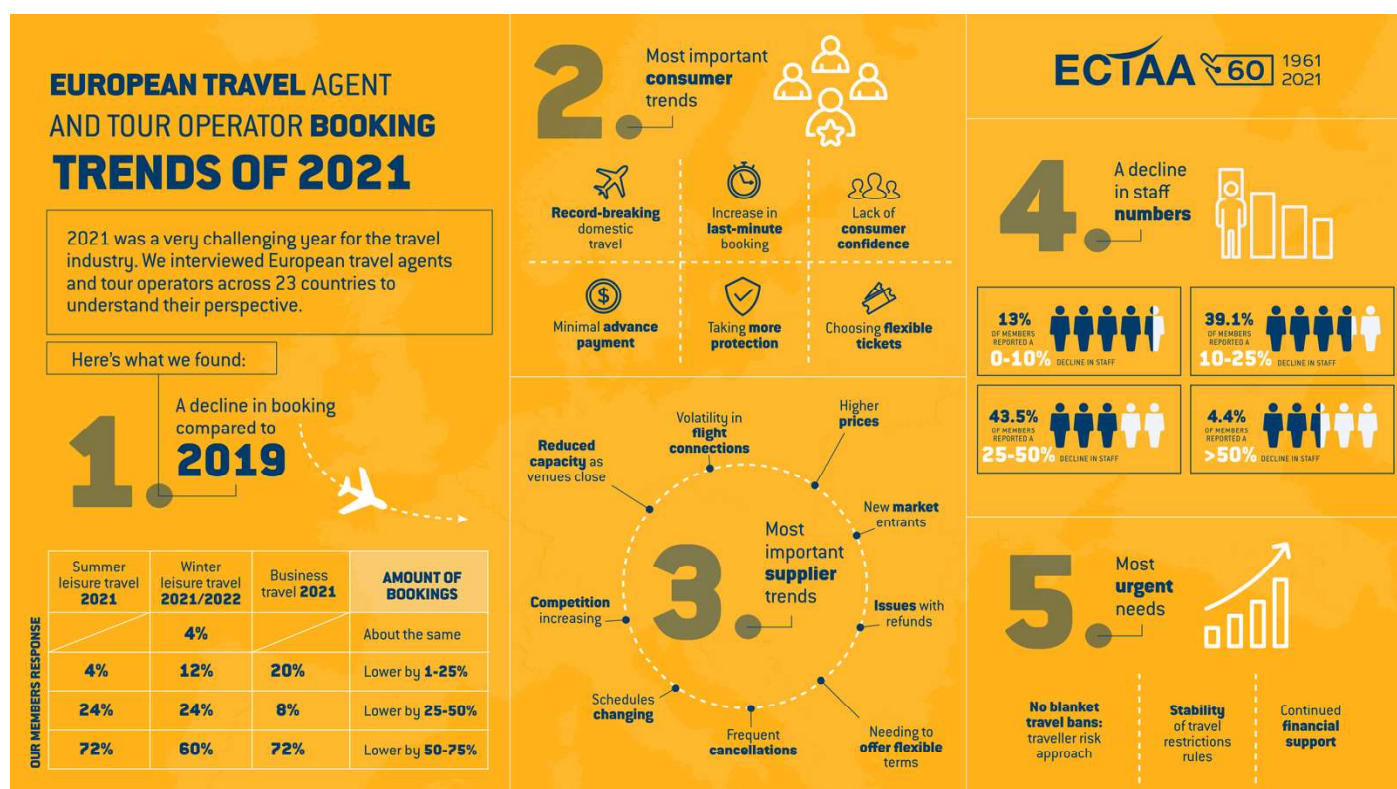
Further work is still required to allow European -and especially international- travel to fully recover. The DCC should serve as a blueprint for other nations looking to implement digital vaccination certificates to help facilitate travel. But we also need further changes, such as an update and alignment of the travel rules and restrictions, notably in respect of recognised vaccines, the duration of the validity of tests and vaccinations, acceptance of antigen tests, etc.



# TRENDS REPORTING

ECTAA monitors closely how the market evolves in the Covid-19 crisis. It regularly carries out surveys among its Members to understand the booking situation in travel agents and tour operators and identify the most important trends and issues. This information is shared with Members and industry partners, but also the European institutions to ensure that they understand the impact of Covid-19 on the industry and adopt appropriate measures. The survey carried out by ECTAA in October 2021 shows an upward trend in bookings in travel agents and tour operators but the majority of Members still reported bookings lower by 50% compared to 2019. See infographic below.

ECTAA also regularly monitors and reports on the value of outstanding vouchers that will come to maturity and that puts significant pressure on travel agents and tour operators, that are already financially squeezed. This is shared with DG GROW and DG JUST of the European Commission, responsible for tourism and consumer protection (package travel directive) respectively, to highlight the enormous financial strain that travel agents and tour operators have been under in light of the fact that many suppliers have held back prepayments (notably airlines), while travel agents and tour operators were required to offer refunds to their customers. This is necessary in view of a possible revision of the package travel directive and air passenger rights to highlight the need for better burden sharing.





# PACKAGE TRAVEL DIRECTIVE

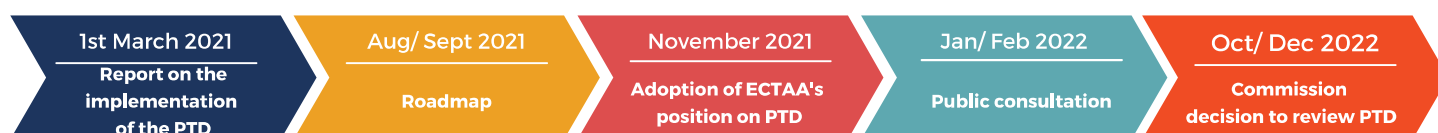


Package travel remained high on the agenda in 2021, both for ECTAA and EU institutions, considering the lasting effects of the Covid pandemic and the liquidity crisis the industry is facing. After witnessing the shortcomings of the Package Travel Directive (PTD), ECTAA maintained the dialogue with the European institutions to get a better recognition of the issues and challenges the pandemic had underlined and start a review process. It has been acknowledged that the PTD was not designed to tackle pandemic situations and that the legislation governing the travel ecosystem needs more harmonisation.

In its implementation report of March 2021, the European Commission announced that it will further assess if the PTD needs revision and take a decision in 2022. It published a roadmap in September 2021 and a public consultation will be launched in January/February 2022. ECTAA, via the relentless work of its Legal Committee, participated at every stage of this process. The Legal Committee adopted a new position in November 2021. This position takes into account the experiences gathered during the Covid 19 pandemic and calls for redistribution of the responsibilities in the travel value chain, in particular:

- Greater synergy is needed between the PTD and the Air Passenger Rights regulation, in particular with regards to insolvency protection.
- During the pandemic, it has been very difficult for tour operators and travel agents to refund their customers. To ensure that package travellers are refunded in time, service suppliers holding their money must refund the intermediaries in due time. More legal obligations on services providers (airlines and hotels) and better enforcement of B2B obligations are therefore necessary.
- The PTD should also be updated with clear rules on vouchers and a rapid refund system to handle swift reimbursement of consumers, should another worldwide crisis occur in the future.
- For brick-and-mortar travel agencies, it should be as easy to sell linked travel arrangements as their online counterparts.

This position has been presented in detail to the European Commission and a majority of the topics raised in the document will hopefully be integrated in the upcoming public consultation on the matter.





# SHORT-TERM RENTALS



The sale of short-term rentals (STR) via online platforms is increasing. In 2019, platforms selling these travel services have grown by 14%, compared to 2018. It is also a growing challenge for ECTAA Members. Travel agents and tour operators have often to comply with more stringent regulations. ECTAA, via a dedicated working group, looked into the practices of some online platforms providing short-term rentals and combination of travel services, to assess whether their practice was in compliance with existing EU Legislations, in particular the Package Travel Directive. It identified several challenges that should be tackled either at national or at EU level: transparency of platforms and hosts, insolvency protection, better information for consumers, level of professional qualifications...

In September 2021, the European Commission started to work on an initiative to improve the framework for short-term accommodation rental services. In this initiative, the European Commission is looking at possible rules with regards to data sharing, better transparency and preventing market restrictions.

On this matter, ECTAA's initial position on STR is as follow:

- There should be no differentiation between rules for professional and non-professional hosts with regards to safety and consumer protection. Consumers' exposure to such risk is at least identical if not greater when using the service of a peer.
- There is a need for improved access to STR data which will be beneficial for better understanding of the market and an improved management of tourist flows.
- Rules for hosts and platforms should be better enforced and registration/authorisation of host should be mandatory.
- A harmonisation in terms of criteria and standards defining STR should be initiated at EU Level.

ECTAA will continue to monitor and encourage the development of a clearer framework for STR at EU level in 2022.

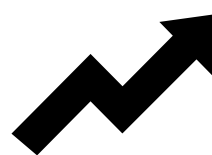
## In 2019, via Airbnb, Booking, Expedia or Tripadvisor in the EU



**554 million nights  
booked**



**1.5 million daily guests**



**Growth by 14 %  
compared with 2018**



# IATA

ECTAA represents indirect distribution interests in global IATA forums like the Passenger Agency Global Joint Council (PAPGJC). The discussions held in the last year were especially influenced by the COVID-19 pandemic. Some of the matters dealt with include:

- **Local Financial Criteria (LFC):** ECTAA raised awareness for the need to adapt the LFC through discussions in the local APJCs to make sure that IATA accredited agents were in position to fulfil the criteria and continue their business. Discussions resulted in (temporary) adjustments of LFCs in various markets that brought relief to many agents.
- **Fees for late notification of changes:** ECTAA raised the issue of high administration fees applied by IATA for late notification of changes by agents, which can sometimes be very minor changes. In some cases IATA applied some lenience. All Members were informed again about the requirement for agents to immediately report any changes to IATA to avoid these fees.
- **Remittance Holding Capacity (RHC):** The RHC determines the outstanding amounts an agent can have in BSP cash sales and is calculated based on preceding periods. Without a temporary change of the RHC for 2021, many agents would have had extremely low RHCs and would have been hindered trading or would have had to provide additional guarantees. In discussions with IATA, it was agreed to temporarily adjust the RHC based on 2019 sales.
- **Excess Void Charges:** ECTAA strongly criticized the unilateral implementation of Excess Void Charges in many markets and also recommended Members to take this up in their local APJCs.
- **Airline risk management framework:** Under pressure from airlines and agents, for the first time ever IATA has engaged in discussions about an airline risk management framework. ECTAA has actively contributed in working group meetings and an airline risk management framework is now finally being implemented.

ECTAA continues feeding into the complaint filed with the EU Competition Authorities (DG COMP) in May 2019 against IATA for abuse of their dominant position within the Passenger Agency Programme. ECTAA has provided additional background information supporting the case to convince DG COMP to look into our case and act. So far DG COMP has not formally opened investigations against IATA.

The EU Competition Authorities are closely following the developments in air distribution market and opened in November 2018 a formal investigation to assess whether agreements between booking system providers Amadeus and Sabre on the one hand, and airlines and travel agents on the other, may restrict competition in breach of EU antitrust rules. These investigations were stopped in summer 2021 due to lack of conclusive evidence.

There is currently a case filed with the Swedish Competition Authorities which relates to a dispute between OTAs and the airline Finnair over the question whether an OTA is allowed to discount the price of an air ticket below the airline price. This case is closely monitored by DG COMP and could have repercussions for the whole EU.

# SUSTAINABILITY

## SUSTAINABILITY IS HERE TO STAY - LET'S GET STARTED!

Over time, sustainability has gained in importance and there is an increasing interest in developing sustainable practices in the tourism sector. The COVID crisis has opened a window of opportunity to foster change in the travel sector towards a more sustainable tourism. All actors in the tourism value chain, including travel agents and tour operators, have a vital role to play in this transformation. This is the reason why ECTAA and its Members are doubling efforts to help the industry to become more sustainable.

### Importance of sustainability

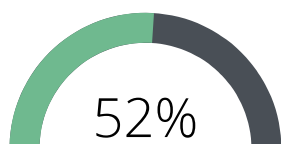
In May 2021, ECTAA conducted a sustainability survey among its member associations. The survey gathered responses from 23 associations (out of 30 countries represented within ECTAA). The objective was to see how sustainability is currently being tackled by the associations, the interest of their Members (or not) in sustainability, what they are already working on and the challenges they are facing in adopting or improving sustainability practices, including the impact of the pandemic.

### Key findings

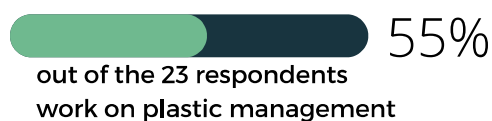
#### From an association perspective



15 out of 23 ECTAA Members think that sustainability is an important theme



12 out of 23 ECTAA Members have a dedicated staff working on sustainability



55%  
out of the 23 respondents work on plastic management

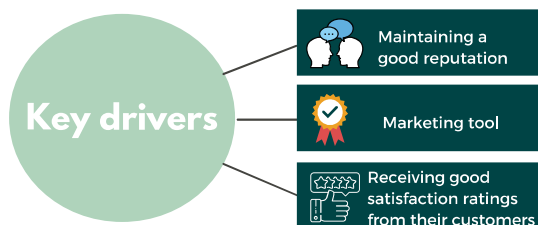


45%  
out of the 23 respondents work on carbon management



40%  
out of the 23 respondents work on supply chain management

#### From a company perspective





# SUSTAINABILITY



## The Glasgow Declaration

ECTAA decided to align with other sector leaders to sign the Glasgow Declaration on Climate Action in Tourism. Launched at the COP26, the Glasgow Declaration is a pledge which aims at pushing for concrete climate action in the tourism sector in order to cut tourism emissions at least in half over the next decade and reach Net Zero emissions as soon as possible before 2050. Since the tourism sector has a huge impact on climate change, it can play an important role in improving the climate situation and, above all, learn from the COVID-19 crisis to be resilient but considering more sustainability. As a supporting association, ECTAA will develop a Climate Action Plan to support the industry's contribution to climate actions via the five pathways: (i) measure emissions; (ii) decarbonise; (iii) regenerate; (iv) collaborate and (v) finance to reach objectives. This will be done by working closely with its Members to help raise awareness, mobilise industry to act, knowledge-sharing, etc.

ECTAA encourages all its Members to sign this declaration and start working with their Members on climate change actions. Two of our Members are launch partners of this initiative: ANVR and APAVT. FTO has also joined the initiative.



## The SUSTOUR project

ECTAA is participating in the SUSTOUR project which is co-financed by the European Commission under the COSME programme with the objective to foster sustainable practices among travel agents and tour operators.

The most important objective is the development or updating of existing standards, training and (online) implementation tools to effectively implement sustainability within tour operators and their supply chain. Moreover, it offers to interested SMEs the opportunity to work towards Travelife certification. Key focus areas will be the management of carbon and plastics, two of the key environmental impacts of the travel sector. Specific tools will be developed for the carbon management of (shore) excursions.

The project is supported by seven projects partners, notably ECEAT and Futouris as well as five associations of travel agents and tour operators at European and national levels: ECTAA (Europe), ANVR (NL), SMAL (FI), APAVT (PT) and UHPA (HR).

More information available: <https://www.travelife.info/sustour/?menu=home>



Co-funded by the COSME programme  
of the European Union



# REFUNDS



During the pandemic, a huge issue arose around air ticket refunds. ECTAA was mostly involved in the B2B aspects of the refund problems.

When a flight is cancelled, airlines have a refund obligation vis-à-vis the customer under the EU Air Passenger Rights Regulation (261/2004). For indirect sales there is a clear obligation for airlines to refund timely. This is however only regulated in an IATA Resolution (824r).

To protect their cash, many airlines switched off the common refund process via the GDS which allows a relatively timely refund to agents who in return can refund their customers. Instead, agents had to apply for each refund via BSPlink. Many refunds were processed – if at all – with months of delay. This put travel intermediaries and the whole travel value chain in a desperate situation. Many travel companies could not fulfil their refund obligations under the Package Travel Directive as the money for air tickets was long transferred to the airlines while the refunds were not processed by airlines.

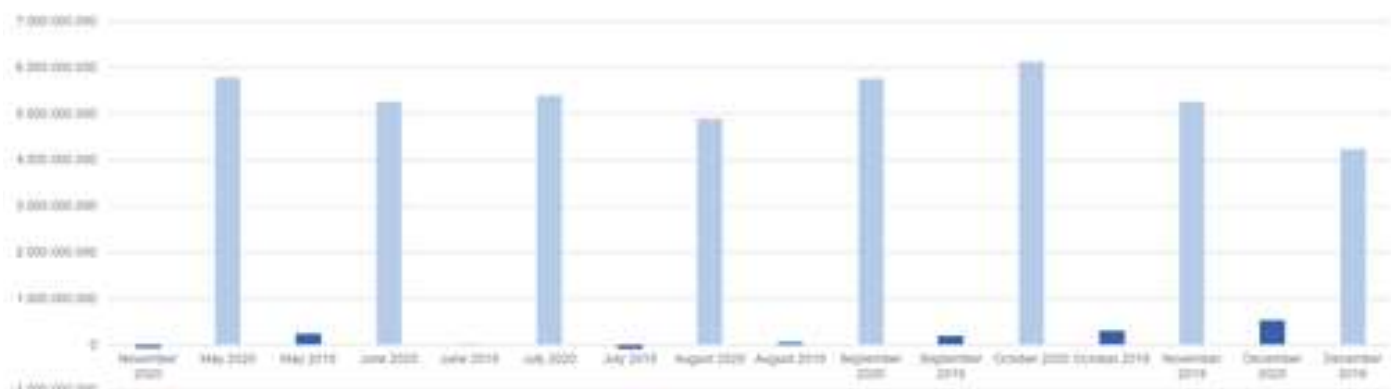
Another issue in relation to refunds is that flight-only passengers with a non-refundable ticket who decide to cancel a flight themselves due to extraordinary circumstances do not have a right to reimbursement under EU law.

Under the PTD, passengers whose flight is part of a package have to be reimbursed if they cancel the package themselves. This put an additional burden on package travel organizers.

On the one hand, ECTAA was in exchange with individual airlines and IATA to remind them of their refund obligations. On the other hand, we have explained the difficult situation for travel intermediaries and provided many examples to the European Commission, the European Court of Auditors (ECA) and the Consumer Protection Center Network. Many airlines have switched the GDS refunds back on and the Commission has approached airlines and reminded them about their refund obligations.

The Commission is aware of the lack of B2B regulation and understood the challenges of travel intermediaries with an effect on their customers. In its 2021 report, the ECA makes the recommendation to the Commission to “take action and, where appropriate, make legislative proposals to clarify the roles and responsibilities for ticket reimbursement where intermediaries are involved”. In its reply to the ECA report, the Commission accepts all recommendations and “[t]he Commission considers that the role of intermediaries regarding air passenger rights needs clarification.” The issue should be addressed within the Air Passenger Rights framework which is up for revision.

In its PTD position ECTAA asks to ensure that package travellers are refunded in time and for that, service suppliers holding the prepayments must refund the intermediaries. This will also be reflected in the ECTAA position on Air Passenger Rights.



During the pandemic there were negative sales in markets – more ticket refunds than new tickets issued. Airlines stopped automatic refunds to protect their cash

# COMMUNICATION

ECTAA is permanently developing its activities in the field of public relations. Social media plays a key role in helping delivering specific messages to a targeted audience. In July, ECTAA opened its own LinkedIn page [ectaaeurope] to complement its twitter account. Posts and articles are regularly uploaded to give a better understanding of the situation of our industry and convey in a new way the messages of ECTAA. It is planned to further develop the use of this media and combine it with the advocacy work of the secretariat.

ECTAA produced a video animation around the importance of the travel advisors in the travel ecosystem, their added-value for customers and their relevance in an increasingly digital and more sustainable market. The video was made available to Members for use on their respective markets. Together with the communication agency ZN Consulting, ECTAA successfully launched two campaigns on Twitter in July and September to promote this video with the support of additional visuals. This led to more views of the video – see below.

## Twitter campaign in brief:



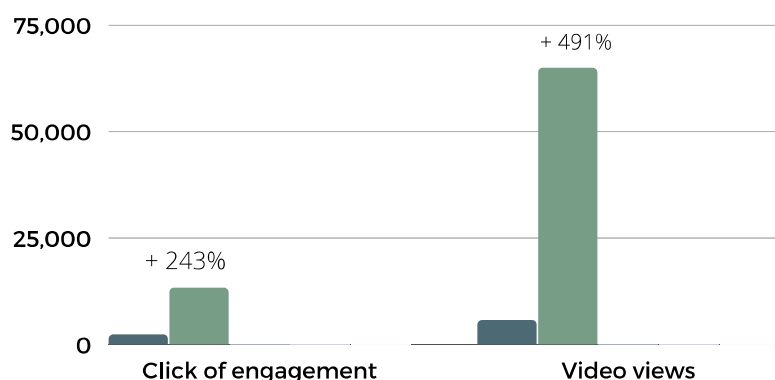
**Video views and engagement goals have been overachieved. Promoted tweets have helped spread the campaign's messages, especially in July, where more mentions were achieved.**



**The posts with the most interactions were those that were promoted, logically, but videos or animations, as well as showy photos were the ones that obtained the highest engagement rate in general.**



**The most relevant interactions came from the tourism industry, from both companies and travel agency unions, journalists, and some staff of European policy institutions.**



● Goal ● Achievement



Video available on ECTAA website





# MALEV

## **Malev case closed – refund payments finalised**

The former Hungarian flag carrier Malev went bankrupt in 2012. Agents kept remitting monies to the IATA BSP trusting in a refund agreement that IATA signed with the trustee of Malev stating that the money collected by the BSP for flights not (entirely) flown would be refunded to the travel agents (or more specifically to passengers) and not to Malev. A Russian bank which was a creditor to Malev asserted rights to the assets withheld by IATA, based on a previous agreement with Malev. The liquidator of Malev then asked IATA to turn the monies to him. ECTAA insisted that IATA continues the refund process, but IATA blocked the funds. IATA agreed that it would refund the money to travel agents, if there was a Court decision instructing it to do so and which would protect IATA from claims of other creditors.

In 2015 ECTAA initiated a court case in the Netherlands on behalf of some 190 agents. In the summer of 2018, after a lengthy case, the Court handed down its judgment requiring IATA to pay back 72% of agents' claims. The lawyer representing the bank threatened to appeal causing further delays and risking an uncertain outcome. Several meetings took place between IATA, ECTAA and the lawyer until an agreement was found. At the end of 2020, all agents with legitimate claims received some 60% of their claims after legal costs were deducted. This allowed them to partially refund their customers. With the final numbers of unclaimed monies clarified, agents which received already a payment for valid claims earlier received another smaller "second bite".

# AIRLINE INSOLVENCY PROTECTION

ECTAA has identified airline failures and the lack of protection thereof as a big problem for decades now. We have advocated ever since for a mandatory airline insolvency protection and finally there seems to be some movement in this area.

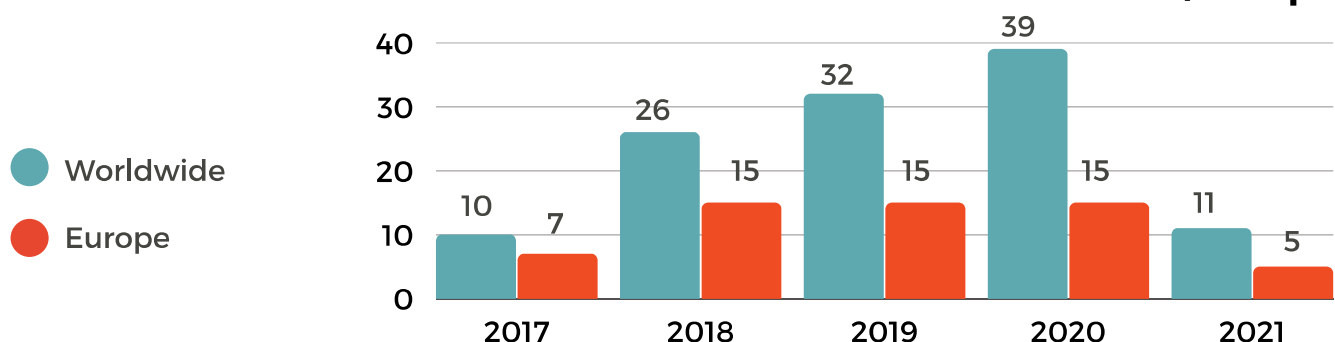
On average one airline failing per month in Europe leaves customers (B2C and B2B) with huge losses. The pandemic has increased the pressure additionally. Instead of refunds, airlines have been issuing vouchers that are not protected in any form against the insolvency of the carrier. There is a risk that more airlines may go insolvent, leaving all the issued vouchers worthless (not to mention the unprocessed refunds). A short-term solution is needed!

Also, a long-term solution addressing the lack of airline insolvency protection is needed. There are several solutions that ECTAA and other stakeholders presented in the past. In Denmark there is a guarantee fund that covers not only package travel contracts (legal requirement under Package Travel Directive (PTD)) but also air tickets. Airlines have to pay a small contribution for each passenger travelling from a Danish airport. The fund covers the repatriation and also prepaid tickets apart from a small lumpsum amount. It is very important though that there are no restrictions on B2B reimbursements - refunds must also be made to travel agencies and tour operators when tickets are part of a package.

There are other possible solutions including insurances, guarantees, escrow accounts or “sliced” payments with down payment + final payment like for packages. As in the PTD, a mandatory solution to protect air tickets is urgently needed, but the form should be left to Member States, provided that certain conditions are met: all passengers have to be repatriated and refunded, mutual recognition of insolvency schemes, no double imposition/obligation based on place of residence of the passenger or registration of airline, B2B refunds are covered (for tickets that are part of a package). National Enforcement Bodies should be involved in helping Member States to set up national systems.

After pushing for 20 years, ECTAA is happy to see airline insolvency protection being addressed in the Sustainable and Smart Mobility Strategy of the EU Commission and the Special Report on Air Passenger Rights of the European Court of Auditors highlighting the need to address it as well.

**Airlines failures - worldwide/Europe**

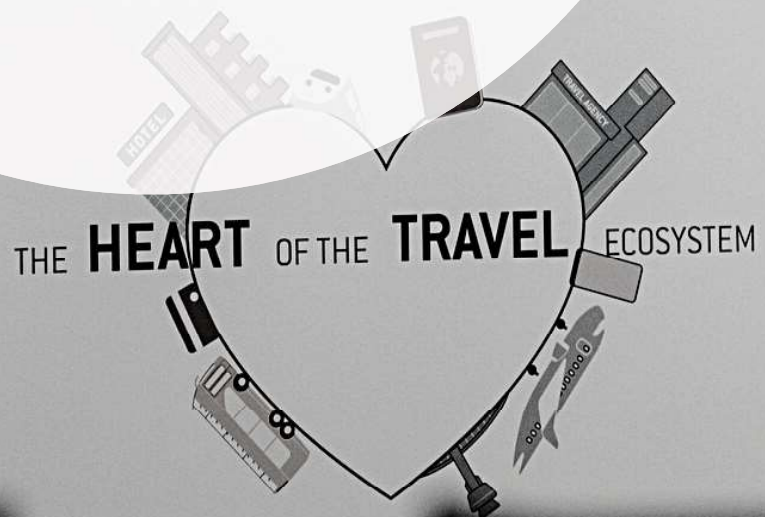


# ECTAA

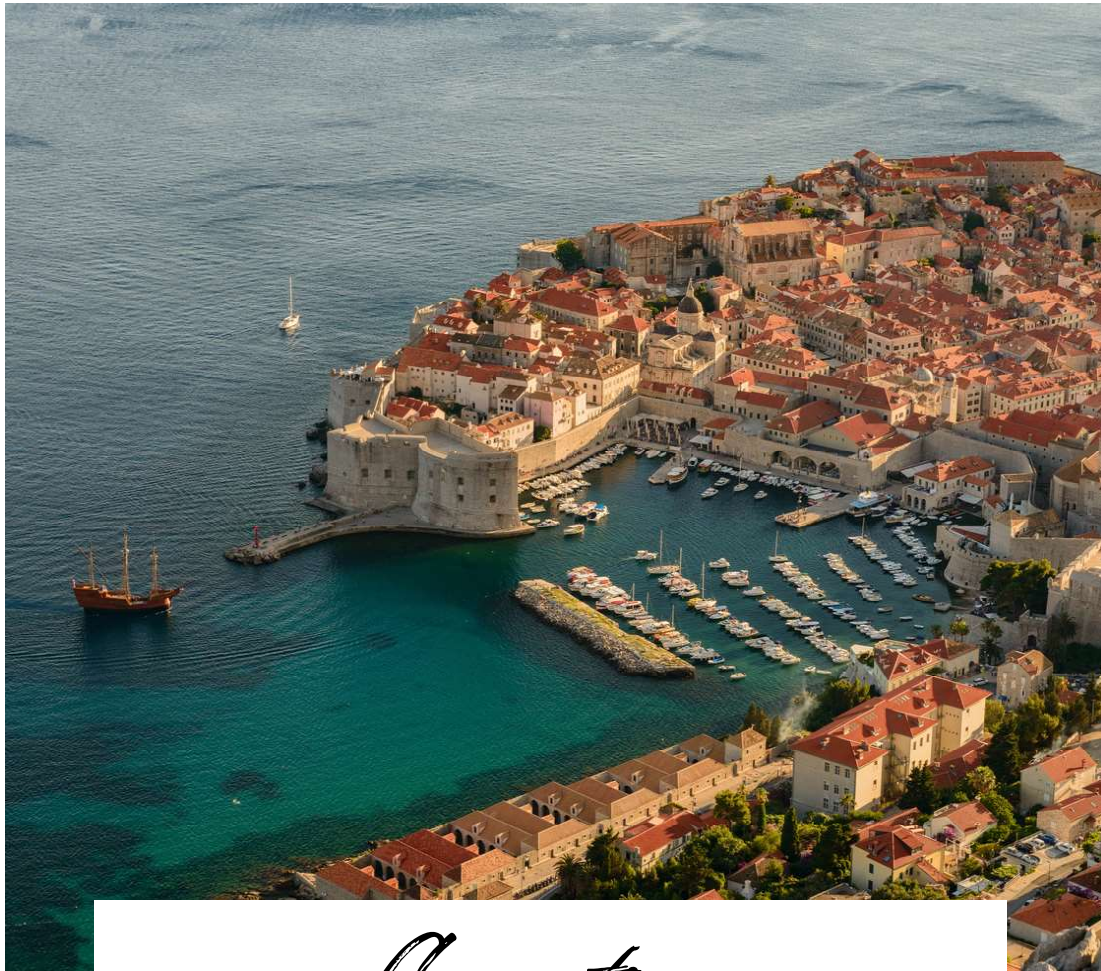
THE EUROPEAN TRAVEL AGENTS'  
AND TOUR OPERATORS' ASSOCIATIONS

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## ORGANISATIONAL dimension







*Croatia*

## OUR PREFERRED DESTINATION 2021



Throughout the year, ECTAA and the Croatian National Tourism Board, CNTB, carried out many promotional activities – monthly newsletters, regular posts on Twitter, ECTAA webpage (banners, monthly presentation of Croatian clusters and tourist products). In addition, in May we held a webinar focusing on Croatia as a safe and attractive destination in 2021, and we held the 122nd semi-annual meeting of ECTAA in Zagreb in July.



## City of Zagreb

Zagreb is the capital of the Republic of Croatia, and it's almost a million strong political and diplomatic, cultural, economic, mercantile, transport & communication and sports centre. A typical Central European town, it is a town of contrasts– young and old at the same time, dedicated to business in the morning, relaxed and fun-loving in the evening.





## Istria

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The heart-shaped peninsula that reaches deep into the clear blue waters of the Adriatic Sea is a hidden garden of beauty, which opens the door to the sunny and warm Mediterranean. You will come across prehistoric hillforts and ancient and fortified medieval towns, with characteristic streets, squares, churches, and town halls in this area. The largest Istria's urban centre is Pula, which boasts a diverse, impressive cultural heritage.

## Kvarner

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Kvarner is ideal for visitors looking to enjoy the combination of a beautiful coastline, sunny islands and almost intimidating mountains looming over the coastline. The region's largest city is Rijeka, a fascinating and dynamic centre with a rich cultural and artistic life. Along with the gorgeous coastline, Kvarner has in its hinterland there the idyllic region of Gorski kotar, a perfect place for all nature lovers who seek peace and tranquillity.



## Dalmatia - Zadar

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The Zadar region is the northernmost part of Dalmatia, rich in historic heritage and breathtakingly beautiful nature. For those seeking inspiration, the charming city of Zadar, situated along the coast, is home to modern architectural wonders – such as the Sea Organ – that embrace the best of what nature has to offer. Zadar infuses historical heritage with breathtaking natural beauty to create a unique experience for visitors.

## Dalmatia – Šibenik

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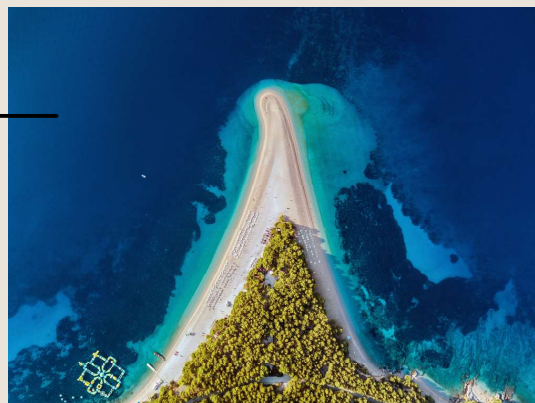
Set amid the wild beauty of white karstic rock and the azure sea, the Šibenik water area is a yachting paradise, boasting as many as 240 isles and reefs. The 'capital' of the region – the marvellous Šibenik will amaze you with the Cathedral of St James, whose dome overlooks medieval stone buildings and its narrow streets, inviting you to socialise in the warm summer evenings the attractive Mediterranean ambience of the town.



## Dalmatia - Split

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In the very heart of Dalmatia, in the bay of Aspalathos (Split), well protected from the sea by the islands of the Split archipelago and defended on its landward side by high mountains, the Roman Emperor Diocletian created a special point on the map of the Adriatic: the future city of Split. When in the Split region, make sure not to miss the island of Brač, the highest Croatian island and the third-largest in the Adriatic Sea, with the Zlatni rat beach - one of the most famous symbols of Croatian tourism.



## Dalmatia - Dubrovnik

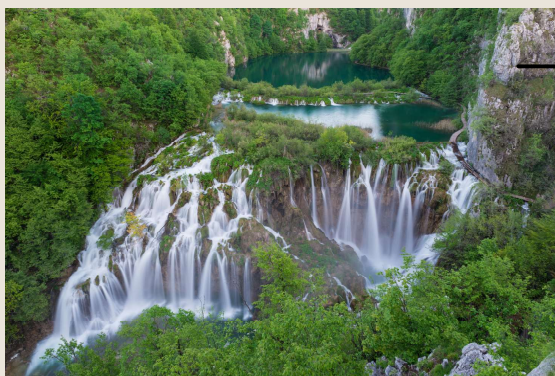
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Dubrovnik, the centre of the southernmost region of Dalmatia and its most famous representative, is also the star on the front pages of many prestigious world magazines. It is also at the very top of the scale of the most beautiful cities of the world, with its 1940 logs defensive walls - today under the protection of UNESCO - which girdle a city that carries the appellation of the Pearl of the Adriatic.

## Slavonia

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Slavonia is a mythical region situated in the Eastern part of Croatia, shaped by the mighty rivers Drava, Danube, Sava and Ilova. Known as the greenest and the largest city in the region of Slavonia, Osijek is a perfect place to enjoy long, romantic walks along the river Drava overlooking rich Baroque style architecture and the former most advanced fortress in Central Europe - The Citadela ("Tvrdža").



## Lika Karlovac

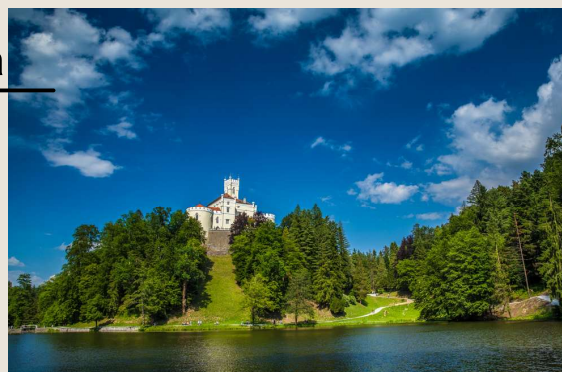
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The Lika-Karlovac tourist region belongs to the continental part of Croatia, the link between the Dalmatian littoral and the central section of the country. It is most famous after the beautiful Plitvice Lakes National Park. This phenomenon attracts with its uniqueness and the effect it bears on both our mental and physical well-being.

## Central Croatia

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Central Croatia lies in the rivers the Sava, Drava, and Mura valleys. The fans of the tranquil and soothing atmosphere of the mainland, where romantic medieval towns, summer homes and manors dot the countryside and where thermal springs, health spas and places of pilgrimage beckon, will enjoy the blessings offered by Central Croatia.







# PARTNERSHIPS

The crisis initiated by the outbreak of Covid-19 has been a huge challenge but also offered opportunities as regards the organisation of work of representative organisations. Use of digital tools has been by necessity widespread during the last 20 months and they will remain part of the tools used by ECTAA in the future to work with Members.

As a matter of fact, these new ways of working and communicating have also been a driver for change for ECTAA in the provision of services to Members. New web-based services reserved to Members on very specific topics have been successfully developed. This allowed ECTAA to agree on partnerships with the Greek National Tourism Organisation (GNTTO) and Wex. Together with GNTTO, ECTAA organised 3 showcases on Greece for specific source markets in cooperation with national Member organisations. The agreement with Wex is the result of long-standing collaboration through workshops primarily focusing on payment strategy of suppliers.

While the main goal of ECTAA will remain lobbying the European institutions and supporting its Members at national level, these new services are a useful and welcome addition for ECTAA and its Members. It is firstly an opportunity to increase at no cost the portfolio of activities that Member organisation can offer to their Members. Secondly there is clearly a demand from innovative companies operating in the travel and tourism sector to address an audience made of travel advisors and tour operators. by acting as a link, ECTAA is also increasing chances to access other sources of incomes and reduce its dependence on Members' contributions.

**GREECE**



**3 Showcases targeting  
3 source markets**



**90 travel agents and tour  
operators**



**2 Workshops with WEX  
on payment strategy for  
travel agents and tour  
operators**



**20 travel agents  
(upon invitation)**

## SEMI-ANNUAL MEETINGS



In 2021, ECTAA held two semi-annual meetings which presented the travel sentiment and business perspectives in the COVID-19 crisis and addressed two essential topics for the travel industry: building back the sector better and preparing a future-proof European legislation.

A particular effort was made to ensure the presence of high-level guest speakers in both meetings. Representatives from institutions such as UNWTO, European Commission and European Parliament showed their interest to exchange with the delegates from the Member organisations on policy developments. The European Travel Commission, Airports Council International, the European consumers organisation BEUC, Skyscanner, Amadeus, International Association of Convention Centres, EU Travel Tech also contributed to the debates by providing the views of the stakeholders of the travel and tourism ecosystems. In addition, Carsten Wendt, as a keynote speaker, and Marc Van Ranst, the well-known Belgian epidemiologist, enriched the debates with expert knowledge. Finally, Commissioner Didier Reynders expressed his views on consumers protection.

Thanks to these inputs and the reactions from the Member organisations, debates held during these two meetings were both useful and interesting. The outcome of these discussions provided a better understanding of the situation of the industry. It also helped shaping the position of ECTAA on the Package Travel Directive and encouraging ECTAA taking its first commitments as regards sustainable travel.

Substance of discussions was at the heart of our work, but the crisis obliged us to find innovative solutions to ensure a maximum participation in meetings. Together with the colleagues from UHPA and UPA-HGK, ECTAA offered a hybrid meeting of high standard in Zagreb. On the one hand, all Members of ECTAA participated to the meeting in Zagreb, either in person or online; on the other hand, exchanging in-person has added-value that is not possible by remote participation. This was the reason for organising the second semi-annual meeting in Brussels in an in-person only format. ECTAA with the active help of FTI-FIT successfully gathered more than 80 delegates for the celebration of ECTAA's 60th anniversary.



## SEMI-ANNUAL MEETINGS



# Zagreb

July  
2021

June

1

Business meeting

June

2

Business meeting

General Assembly

Board meeting



# Brussels

November  
2021

November

8

SUSTOUR training

November

9

ECTAA Technical Committee meetings

Bilateral meetings  
Members-MEPs

Conference 60th  
anniversary of ECTAA

November

10

Business meeting

Board meeting

Extraordinary General  
Assembly





# LIST OF MEETINGS



- 12** Legal Committee
- 13** Destination & Sustainability Committee
- 19** Joint Air Matters Committee & Technology Working Group
- 28** Working Group on Start-up travel



- 2** Executive Board
- 5** Working Group on Start-up travel
- 9** Legal Committee
- 12** Working Group on Start-up travel
- 19** Working Group on Start-up travel
- 26** Working Group on Start-up travel



- 3** Joint call Air Matters Committee & Technology Working Group
- 5** Working Group on Start-up travel
- 9** Legal Committee
- 11** Fiscal Committee
- 19** Working Group on Start-up travel
- 23** Executive Board



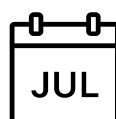
- 12** SUSTOUR kick-off
- 20** Legal Committee
- 20** Joint Air Matters Committee & Technology Working Group
- 20** Joint Tour Operator & Destination Committee
- 27** Executive Board



- 7** Fiscal Committee
- 10** Technology Working Group
- 10** Executive Board
- 11** Webinar: "Croatia, Safe & Attractive"
- 18** Legal Committee



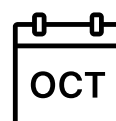
- 9** Fiscal Committee
- 15** Legal Committee
- 18** Executive Board



- 1-2** ECTAA 122nd semi-annual meeting Zagreb
- 13** Legal Committee



- 7** Legal Committee
- 13** Fiscal Committee Working Group
- 15** Fiscal Committee Working Group
- 16** Fiscal Committee Working Group
- 21** Executive Board
- 22** Fiscal Committee Working Group
- 28** Workshop "How can B2B payments improve your risk management post Covid?"



- 5** Legal Committee
- 26** Executive Board
- 29** Executive Board



- 9** Air Matters & Legal & Sustainability Committees
- 9** ECTAA Conference & 60th anniversary Gala Dinner
- 8-10** ECTAA 123rd semi-annual meeting Brussels



- 13** Air Passenger Rights Working Group

A black and white photograph of a woman with blonde hair and glasses speaking into a microphone at a conference. She is wearing a dark jacket and a lanyard with 'ECIAA' on it. In the background, another person is partially visible, and there are microphones and a laptop on the table. A large, semi-transparent white circle is overlaid on the image, containing the number '3' and the title text.

3

# **POLITICAL PRIORITIES** **&** **work programme** **2022**



# OUR POLITICAL PRIORITIES 2022



## Coordinated approach to Covid-19

Priority for 2022 is to lift any unnecessary travel restrictions. ECTAA will continue to press EU and global governments to **adopt a common approach on travel restrictions** and public health protocols that is **based on strong evidence of benefit**, as well as **principles of proportionality**. Our priority will be to move to an individual risk-based approach and update and align the travel rules and restrictions, notably in respect of recognised vaccines, the duration of the validity of tests and vaccinations, acceptance of antigen tests, etc.

## Package Travel Directive

2022 will be key for package travel as its possible revision will be decided that year. A public consultation will be launched early 2022 and will cover all the main issues identified by the EU Commission, the travel industry and consumer associations. It will in particular take into account the experience gathered from the Thomas Cook bankruptcy in 2019 and the Covid-19 pandemic: application of the insolvency protection rules on airlines, what should the insolvency protection cover, limitation of prepayments, B2B refunds, scope, definition of package and Linked travel arrangements. ECTAA has already adopted its position and will feed into this consultation.

## Air distribution

The Commission is working on a revision of the Air Services Regulation and the CRS Code of Conduct. This has been in the pipeline for some time, but the Commission would like to incorporate the lessons learned from the Covid-19 crisis and review this also against the background of the development of multi-modal digital mobility services. ECTAA's priority will be to ensure that these legislations take into account the market developments, among other airlines' addition of surcharges, removal of content from the regulated neutral marketplace (GDS), different rules for GDSs and other players (airlines' own sales channels, aggregators, etc.), which put in jeopardy **transparency, neutral display and choice for the consumer**.

## Passenger rights

The Commission intends to review the passenger rights regulatory framework (all modes), including to ensure its resilience to extensive travel disruptions. It will assess the options and propose, if appropriate, an adequate financial protection scheme to protect passengers against the risk of a liquidity crisis or an insolvency regarding the reimbursement of tickets and, if needed, their repatriation. ECTAA will be focusing on the air passenger rights legislation, where the priority will be to ensure **proper B2B refunds, notification of operational disruptions by travel agents and airline insolvency protection**.



# OUR POLITICAL PRIORITIES 2022



## Multimodal transport

The Commission plans to adopt a Regulation end of 2022 that aims to better integrate public transport and rail services to achieve seamless multimodal passenger transport. This initiative will tackle a number of issues of relevance for travel agents and tour operators, such as clarifying conditions for combining and re-selling mobility products, access to data, including real-time information to passengers, preventing self-preferencing and favouring neutral display. ECTAA's priority will be to **ensure a functioning and neutral marketplace that provides transparency and choice for all transport modes**. It is therefore important to include "air" in the multimodal framework.

## Special VAT scheme for travel agents

A revision of the special scheme for travel agents is foreseen in 2022/23. The scope is not yet clear and will depend on other VAT initiatives, such as the introduction of a Single VAT Registration and VAT rules for platforms. ECTAA will monitor the developments of these initiatives and continue **pressing for the adoption of a revised scheme** that takes into account the distortions of competition applying to the detriment of travel agents.

## Sustainability

Priority for ECTAA will be to launch the **call for SME applications** in the frame of the EU-funded SUSTOUR project. SMEs will be invited to apply if they wish to receive free technical support that will help them improve their sustainability performance. Further work will also be done on the **elaboration of plastic and carbon management tools for travel agents and tour operators**. This will complement the work that ECTAA intends to do in the frame of the Climate Action Plan under the Glasgow Declaration.

## Data

Data sharing is increasingly important in the digital era. In the first weeks of 2022, the European Parliament and Council will have to formally endorse the informal agreement on Data Governance Act. The draft Regulation aims to strengthen mechanisms that increase data availability and foster trust in intermediaries in order to facilitate data sharing across the EU and between sectors. During the first quarter of 2022, the Commission should present a proposal for a Data Act which will introduce general conditions for consumers and businesses to access the data they generate when using a product or a service in a **fair, transparent, and non-discriminatory fashion**.

In parallel, ECTAA is chairing the drafting committee for a code of conduct (CoC) for data sharing in the tourism sector. This CoC serves as a governance framework for the voluntary sharing of non-personal data in the sector. The goal of the CoC is to provide general guidance to the stakeholders to create valuable data sharing relationships in tourism while building trust.

# OUR POLITICAL PRIORITIES 2022



## Tourism Agenda 2050

The travel and tourism industry is one of the most affected industries by the Covid-19 pandemic. According to the Commission, the tourism ecosystem will require € 161 billion worth of investment to bounce back to pre-crisis levels and to meet the pressing challenges of strengthening resilience and digital and green transitions. The Commission has been working with stakeholders on the **elaboration of a roadmap 2050 towards a sustainable, innovative and resilient tourism ecosystem**, the so-called European Agenda for Tourism 2050. ECTAA will continue providing input for the Tourism Agenda, expected to be adopted in 2022

## Cooperation with stakeholders

As described in the updated framework of activities adopted by the Board of Directors on 10th of November 2021, ECTAA will step up its efforts for an improved cooperation with other stakeholders. The travel and tourism industry is a very fragmented industry with many different stakeholders. Even if there has been some forms of cooperation in the past, Covid-19 has forced all travel and tourism stakeholder associations to deepen the collaboration with each other to speak with one voice in order to be heard. Sadly enough, the crisis is far from being over and this cooperation will remain important for the months to come requiring from ECTAA to concentrate on joint actions that have a stronger impact than solitary actions.

Additional efforts will also be made on common activities with organisations with which ECTAA is already working closely, such as the NET network, EU Travel Tech and ETOA. The aim is to benefit from synergies and develop joint actions or new services for the mutual benefit of our respective Members.

# OUR WORK PROGRAMME 2022



## **Sustainability - European Green Deal**

Implementation of the Sustainable and Smart Mobility Strategy  
Empowering the consumer for the green transition  
Implementation of the SUSTOUR project  
Implementation of the Glasgow Declaration

## **Digital Services**

Digital Services Act  
Digital Market Act  
Short-Term Rental Initiative

## **Consumer protection**

Review of the Package Travel Directive

## **Transport**

Revision of the Air Services Regulation  
Revision of the CRS Code of Conduct  
Revision of passenger rights framework, in particular air passenger rights  
Protection against airline insolvency protection  
Rail ticketing initiative  
Multimodal Digital Mobility Services

## **Tourism**

Tourism Agenda 2050  
Pact for Skills in Tourism

## **VAT**

Review of the special VAT scheme for travel agents  
Single VAT Registration & platform rules

## **Home affairs**

Review of the Passenger Name Record (PNR) Directive

## **Data**

Elaboration of a Code of Conduct for Tourism Data  
Adoption of a Data Act

## **IATA**

ECTAA complaint against IATA - Review of the Passenger Agency Programme  
Monitoring the implementation of an airline risk management network  
Participation to PAPGJC and PAConf  
Monitoring the implementation of New Gen ISS and NDC

## **Destination matters**

Destination issues, such as health and safety, travel restrictions, taxes and fees, etc.





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# ECTAA information

## Members of the Executive Board

President	PIT	Mr Pawel NIEWIADOMSKI
Vice President	ACAVe	Mrs Eva BLASCO
Treasurer	HATTA	Mr Marios KAMMENOS
Member	FIT - FTI	Mr Jan VAN STEEN
Member	UHPA/HGK	Mr Boris ZGOMBA
Member	SMAL	Mr Heli MÄKI-FRÄNTI
Member	ANVR	Mr Frank OOSTDAM

## Committees and Working Groups

### Legal Committee

- PTD Working Group
- Platform Working Group

### Air Matters Committee

- Air Passenger Right Working Group

### Technology Working Group

### Fiscal Committee

- Place of supply and opt-out Working Group
- Global margin calculation Working Group
- Definition of travel services Working Group

### Sustainability Committee

### Tourism Committee





# MEMBERS

## Full Members

**WKÖ/ÖRV**  
Austria

**ETFL**  
Estonia

**FTO**  
Italy

**ANAT**  
Romania

**Amadeus**

**CNTB**

**FTI**  
Belgium

**SMAL**  
Finland

**ALTA**  
Latvia

**SACKA**  
Slovakia

**Sabre**

**Wex**

**ABTTA**  
Bulgaria

**EDV**  
France

**NTVA**  
Lithuania

**ZTAS**  
Slovenia

**Travelport**

**GNT0**

**UHPA**  
Croatia

**DRV**  
Germany

**FATTA**  
Malta

**ACAVe**  
Spain

## International Members

**UPA-HGK**  
Croatia

**HATTA**  
Greece

**ANVR**  
Netherlands

**SRF**  
Sweden

**ITTAA**  
Israel

**FTAV**  
Tunisia

**ACTA**  
Cyprus

**MUISZ**  
Hungary

**VIRKE**  
Norway

**ABTA**  
UK

**MATTA**  
Malaysia

**ACKKA**  
Czech Republic

**ITAA**  
Ireland

**PIT**  
Poland

**DRF**  
Denmark

**Confturismo**  
Italy

**APAVT**  
Portugal