



Mission Statement:

“To express and implement the collective wishes of the members and optimise their trading environment.”

Founded in 1937, the Irish Hotels Federation (IHF) is the national organisation of the hotel and guesthouse industry in Ireland. The primary functions of the Federation are to promote and defend the interests of its members.

In addition to the achievements of a satisfactory taxation and investment climate for the industry, the Federation has a positive role in developing business opportunities for members.

It is officially recognised by government and state agencies as representing the industry. Through its participation in a wide range of bodies, the Federation provides a strong voice for hotel and guesthouse proprietors and for other associated organisations which have an interest in the successful development of this sector of Irish industry.



Irish Hotels Federation

13 Northbrook Road

Dublin 6

Tel: 01-4976459

Fax: 01-4974613

E-mail: info@ihf.ie

Members Website: www.ihf.ie

Be Our Guest Website: www.irelandhotels.com

CONTENTS

| | |
|--|----|
| President's Overview | 2 |
| Chief Executive's Review | 7 |
| Marketing Report | 19 |
| Employment Report | 24 |
| National Council, Executive and Committees | 30 |
| IHF Associate Members | 33 |
| IHF Survey of Members | 42 |



Donal O'Meara, Secretary / Treasurer, IHF, Peter Scallan, Sales Director, Celtic Linen and John Power, Chief Executive, IHF



**IHF PRESIDENT,
RICHARD BOURKE**

As I reflect on my second year as President of the Irish Hotels Federation the striking factor is the continuing strengthening of the Irish economy. In 2005, GDP, which is the value of all goods and services produced in the state, grew by 4.6%. The national labour force is just under two million having grown by 96,500 in the last year. Inflation is 2.6%, and while interest rates may have reached their lowest level and are beginning to increase, all economic indicators in the country are positive. I am privileged, at this time, to be President of the largest sector, in terms of capital investment within tourism, which is now Ireland's most important indigenous industry accounting for 3.7% of GNP.

Early indications are that visitor numbers to Ireland grew to an all-time high of 6.7 million in 2005, contributing €4.3 billion to the Irish economy, while the value of domestic tourism trips grew by 6% in the year, adding €1 billion, giving total tourism earnings for 2005 of €5.3 billion. The continuing strength of the Irish economy and the ever-increasing workforce has resulted in a revenue growth of 51% from domestic tourism since 2000. Irish people are now taking 3.1 million holiday trips in Ireland every year. For most of our hotel and guesthouse members, the domestic market is the most important single source of business.

Driven by the continuous growth in the Irish economy and in particular by the phasing out of the present capital allowance schemes, the construction of new hotels and extension of existing hotels continues at an enormous rate. At the end of 2005, there were 870 hotels registered in Ireland with 47,000 bedrooms, with the average hotel size being 54 bedrooms. (The average hotel size increased from 36 rooms in 1995). Notwithstanding this increase in hotel stock, the estimated room occupancy for 2005 is estimated at 62%, representing an increase of two percentage points on the 2004 figures. However, depending on the location of hotel properties, there are major variations. Occupancy in the major metropolitan areas will be close to 70%, which is marginally under the record levels achieved in 2000 or an increase from 66% in 2004. The occupancy rates in rural properties continue at 54% and are showing no signs of

growth. A more positive performance is reflected in hotels in urban areas with populations over 10,000 where the room occupancy is likely to be about 63%, a 2% increase on 2004.

The sector experiencing the most difficulty is the small country hotel with less than 20 bedrooms, where room occupancy is 39%, a level at which it has continually performed since the difficulties encountered following the Foot & Mouth crisis and the atrocities of 11th September in 2001. While similar occupancy statistics are not available for the guesthouse sector, it would be reasonable to suggest that their performance would be similar to the 'small hotel' category. This variation, which is mainly regional, reflects the findings of the report of the Irish Tourist Industry Confederation (ITIC) in which the Federation participated. The report found that over the last five years, there has been a fundamental change in the composition and spatial spread of holiday visitors to Ireland.

It is my view that the number of nights spent in the country (or bednights), is the key measure of tourism performance. Between 1999 and 2003 there were 2.5 million fewer bednights spent, by overseas holidaymakers, in areas outside Dublin, a 14% drop in demand. The key learning here is not a case of visitors substituting one part of the country for another, but rather Ireland attracting two distinct markets – those attracted to short breaks in major metropolitan areas and visitors motivated by the Irish rural scenery, its people and things to do. The shift in composition and spatial distribution and the value of the holiday visitor market has been clouded by the overall trend of increasing visitor numbers. The fall-off in demand for holidays outside of Dublin by overseas visitor numbers is partly explained by a parallel reduction in car-based tourism, especially the 'bring your own car' segment from Britain. In recent years, there has been an under-performance in our ability to communicate to our markets a compelling reason to visit Ireland, and in particular rural Ireland, for reasons other than a short break.

The launch by Tourism Ireland of its marketing campaign for 2006 which included new advertising and promotion, the style and development of which was influenced by in-depth consumer research in Britain, will, I believe contribute to reversing this recent trend in regional distribution. I hope that adequate funding will be made available within Tourism Ireland for marketing budgets to effectively communicate refreshed and compelling reasons for holidaymakers to visit Ireland.

I view as a positive development the setting up, by Fáilte Ireland, of a Tourism Product Development and Strategy Review Group under the chairmanship of Mr. Dan Flinter, the former Chief Executive of Enterprise Ireland. The objective is to bring forward a strategy and approach to product development which is cognisant of the challenges



identified and the needs to address them, if Ireland is to achieve the targets set in the report by the Tourism Policy Review Group - *New Horizons for Irish Tourism* i.e. to increase to 10 million the number of overseas visitors to Ireland by 2012 and to double to €6 billion the value of their spend.

It is encouraging that in 2005, the visitor satisfaction levels remained high, with 96% stating that their experience either exceeded or matched their expectations. In light of the ongoing business cost increases in our sector, the visitors' rating of value for money, with 67% finding it fair, good or very good, reflects the enormous good value that most of our members provide to their customers.

Throughout the year the Federation has continually drawn attention to the unsustainable high increases in costs of services provided by the state, semi-state and local authority sectors. It is both incredible and unacceptable that the increase in the cost of water supply, refuse and miscellaneous services of over 21% per annum in recent years is allowed to continue. The funding of local authorities and the disproportionate high level of charges made on the hotel sector in particular and business in general needs to be put at the top of the Government's priority list for 2006. It is most disappointing that the efforts made, in the latter part of 2004, by many business organisations, including the IHF, and the cost incurred by these bodies in making submissions, to consultants appointed by the Minister for the Environment on the funding of local government, have not yet resulted in the report of the consultants being published. Many of the cost increases in the local authority charges in recent years were as a direct result of the benchmarking wage review for public sector employees. The quid pro quo for this benchmarking was supposed to be greater efficiency and better service. As the Government has now commissioned the next round of the benchmarking exercise, it is essential that the recommendations forthcoming from the benchmarking body take account of an objective measurement of the quality of service given by the public sector, their efficiency, taking into account value of secure, guaranteed of secure, guaranteed employment and in many cases inflation-proofed pension rights. It is just not sustainable that the productive sector of the Irish economy, of which hotels and guesthouses form a substantial portion and which have disproportionately large premises, should bear the major share in the funding of local authorities. In our submission last June, we called on the Joint Oireachtas Committee on Enterprise and Small Business, that following their success in influencing a major reduction in business insurance costs, they now give similar attention to the out-of-control spiralling of local authority charges.

I accept that a succession of national agreements since the late 1980's, up to and including Sustaining Progress, delivered industrial peace and contributed to the economic

success of the country. However, we must be vigilant that the details of such agreements and the interpretation of their implementation arrived at by such organisations as the Joint Labour Committees (JLC) and the Labour Court do not result in unsustainable costs to the productive sectors of the economy. The Federation was most unhappy with the way the adjustment in the national minimum wage took place in May 2005 and the difficulty created by the increase of over 9%, further exacerbated by the decision of the Hotels JLC and confirmed by the Labour Court, that increases under Sustaining Progress should apply on top of the adjusted minimum wage rate. This resulted in the statutory minimum wage rate for over half of the categories covered by the Hotels JLC increasing by over 14% between July 2004 and July 2006. In any successor to Sustaining Progress, it is essential that safeguards are built-in to ensure that the national minimum wage rate increases are provided for within the agreement. Statutory bodies such as the Labour Court and JLCs must not be allowed to aggregate increases under two separate mechanisms; the wage adjustments of national understanding and the review of national minimum wage rates. There must be only one mechanism. Indeed, with the minimum wage rates and the very onerous labour legislation of recent years, I fail to see any relevance for JLCs. They belong to a bygone era and should be abolished.

December 2005 brought an end to the term of office of the Tourism Action Plan Implementation Group. This effective organisation, under the chairmanship of John Travers, monitored progress on the implementation of the action plan suggested in the report of the Tourism Policy Review Group - *New Horizons for Irish Tourism*. This group reported on progress on the agenda for action set out in the report. It identified the progress or lack thereof by industry, representative bodies, government departments and state agencies in fulfilling the recommendations of this report. I believe that there is an absolute need for the continuation of such a body, in a reviewed form if necessary, and the case for such has already been made to Mr John O'Donoghue T.D., Minister for Arts, Sport and Tourism.



Pictured welcoming the Conference Centre announcement are (l-r) Richard Bourke, President, IHF, Catherine Reilly, Chairwoman, ITIC, Jean Evans, Chief Executive, Dublin Convention Bureau, Aebhic McGibney, Director of Policy, Dublin Chamber of Commerce and Peter Malone, Chairman, Dublin Business Forum

I wish to commend the Minister for the enormous energy and support which he gives to our industry. I want to pay particular tribute to him for procuring Government approval for the appointment of the Spencer Dock International Conference Centre Consortium as the provisional preferred tenderers for the provision of a National Conference Centre. I sincerely hope that in early 2006 contracts will be entered into for the provision of such a Centre, and that a date will be set, hopefully, no later than 2009 for its eventual opening, signifying an end to a major infrastructural deficit in our capital city.

The Federation's pre-budget submission focussed on 3 issues:-

- The removal of the anomaly which prevents the reclaim of VAT on hotel expenses incurred by registered businesses while attending conferences, corporate meetings or incentive travel events;
- An increase of €15 million in the funding of tourism marketing; and
- The immediate redressing of the issues surrounding the financing of local government

The Minister for Arts, Sport and Tourism has also been supportive of the Federation's call, in our pre-budget submission, for the removal of a major competitive disadvantage i.e. the inability to reclaim VAT on hotel expenses incurred by business delegates attending conferences, corporate meetings or incentive travel events. This anomaly places us at a serious disadvantage. Ireland is the only country with a VAT rate on hotel accommodation of more than 10%, which does not allow such reclaim. Many of our competitors including Britain on its website www.visitbritain.com use the reclaimability of VAT on such expenses as a major marketing device. While this matter was not addressed in either the Budget speech of the Minister for Finance or in the Finance Bill as published, we are still lobbying to have the issue dealt with by means of an amendment to the Bill. The Minister must also be commended on €134 million, secured from the Exchequer for tourism, in 2006, representing an increase of 7% on 2005. Included in this figure is €40 million, the largest ever allocation for the tourism marketing fund. The funding of local Government will continue to be a priority in our campaigning in 2006.

The announcement by the Minister for Finance in his budget speech of the final phasing out of the present system of hotel capital allowances by 2008 was a welcome clarification on the issue. The existence of the present system of hotel capital allowances has been a major driver in the growth of Irish tourism and the growth of the Irish hotel product. It is noteworthy that when first introduced in

the mid 1960's, the total number of hotel bedrooms in Ireland was 17,300 of which only 3,650 had en-suite bathrooms and the average hotel has 21 bedrooms. As mentioned earlier in this report, Ireland now has 47,000 hotel bedrooms with the average hotel size being 54 rooms and it is estimated that by 2008, there will be approximately 53,000 bedrooms in the country.

Both the Federation's strategy document, *Blueprint for the Future* published in 2001, and the Report of the Tourism Policy Review Group, *New Horizons for Irish Tourism*, recommended the development and implementation of a modern hotel and guesthouse classification system on the basis of the best, most up-to-date classification criteria. I chaired the sub-committee of the Council of the Federation dealing with this issue and had numerous meetings and discussions with Fáilte Ireland on the development of a modern, objective classification system. This process, insofar as it refers to hotels, is now almost complete and the up-to-date working draft of the classification system for hotels is available on the Federation's website www.ihf.ie. The Classification Committee is now addressing the question of a new classification system for guesthouses. It is their intention to bring the proposed system for both hotels and guesthouses for consideration at a special meeting of members to be convened in the early part of 2006. I believe that the criteria being developed are objective, transparent, easily understood and will lead to efficient implementation and will remove much of the subjectivity that has been a cause of concern in the present system, which has been in place since 1993.



Pictured at the Hotrec General Assembly in London are:
(l-r) Aidan MacManus, President, RAI, Bernd Geyer,
President, HOTREC and Richard Bourke, President, IHF

For many years the President's overview has highlighted the importance of direct air access into Ireland. 2005 has been a very encouraging year, in that the independent airport authorities set up for Dublin, Cork and Shannon have been



proactive in encouraging increased air access into these airports. Most of this increased access is coming on European routes and I particularly welcome the positive manner in which the new Dublin Airport Authority is addressing the necessity for the provision of additional capacity in the short-term at its terminal in Dublin Airport. It is most encouraging that the Authority has a plan in place to develop Pier D by 2007 and a second terminal by 2009. I believe there is now an onus on the Government and the Department of Transport to ensure that a mechanism is provided that guarantees the funding and delivery of these plans. The progress in the renegotiation of a new US-Ireland air agreement to be introduced over a transitional period beginning in November 2006 is of major benefit. Irish airlines will have access to three additional destinations from November 2006, adding to the four destinations currently being served, and from November 2008 there will not be any restrictions on the number of access points. We are hopeful that, while this agreement is conditional on an 'open skies' agreement between the US and EU coming into effect, this major barrier towards increasing air traffic on the Atlantic is finally removed. However, these new arrangements create major challenges for Shannon Airport and the surrounding area. During 2005 we called for the creation of a specific ring-fenced marketing provision of at least €10 million per year for five years, the primary target being Shannon's offering to the North American market. It is also essential that, as provided in the Government's Transport 21 plan, the upgrading to motorway standard of the Galway - Limerick road and the completion of the Dublin - Limerick motorway should be completed by the end of 2008. It is our view that these necessary infrastructural developments are a critical factor to sustain business and tourism activity levels in the Shannon region. This will assist in generating economic growth in the region and in safeguarding thousands of jobs and industries operating along the western seaboard.

On marketing issues, the activity on our marketing website www.irelandhotels.com continues to increase, with the value of bookings made on the site in 2005 exceeding €3.15 million, an increase of 95% on 2004.

In marketing terms, the poor performance of the British market in areas outside of Dublin continues to be an area of concern. The publication of the *"The Top 10 things to do in Dublin"*, an initiative by the IHF Dublin branch, which is on display in rooms throughout Dublin, was a positive measure implemented to address the surprising lack of knowledge in the British marketplace of things to do in our capital city. It is hoped that this *"Top 10 Things to do"* initiative will be extended to other parts of the country in 2006.

I am a member of the group set up by Tourism Ireland to review the North American market, which will operate along

the same lines as the review of the British market that took place in 2004. I believe that it is only by really understanding what motivates potential customers to visit a country, that appropriate, adequate marketing campaigns can be developed.



Pictured at the launch of the Be Our Guest Guide in November are (l-r) Richard Bourke, President, IHF and Julie Gilhooly, Vice President, IHF

The Be Our Guest guide continues to be the leading and definitive guide to guesthouses and hotels in Ireland. 340,000 copies were distributed both in Ireland and overseas in 2005.

In terms of tourism, the hosting of the Ryder Cup in the K Club in September will be a major international showcase for Ireland. This event, together with the Olympics and Soccer World Cup, are the top three world-class sporting media events. It offers an opportunity for all of our members, in conjunction with golf courses throughout Ireland, to highlight the quality of the golf-based product which Ireland has, not just in signature courses but also in small, parkland and links courses throughout the country, where green fees are at a most reasonable level. It is essential that Government, the agencies and the industry leverage this opportunity to its absolute potential. How we capitalise on hosting the world's third-biggest sporting event will be watched with interest. If we use this opportunity, we will reap the benefits for many years.

Angling has for many years been a major attractor of overseas tourism to Ireland. Concern for the Irish angling tourism industry and particularly for the dwindling stocks of wild salmon in our rivers were the motivators for our call on the Government to immediately introduce a strategy for the phasing out of drift netting. Drift netting is causing enormous damage to Ireland's salmon stocks and the salmon stocks of many western European countries. It is encouraging that a recent article in National Geographic highlighted that there was a substantial increase in the number of salmon entering many rivers in North America, Scotland, Iceland and Canada. The article authors

attributed this increase to the conservation methods taken by the appropriate countries. However, the same article severely criticises Ireland's lack of action in the phasing out of drift netting. We hope that 2006 brings about a more enlightened attitude from our Minister for the Marine and Natural Resources and that he takes steps to protect what is a major asset to Irish tourism.

The Federation strongly supports the findings in the PricewaterhouseCoopers report and its recommendations on the restructuring of the Regional Tourism Authorities. We now believe that the recommendations of this report should be implemented immediately and the new structures put in place by the middle of 2006 at the very latest.

In 2006, through our involvement in ITIC we will have a substantial input into the development of a submission to the Government on the drafting of the National Development Plan 2007 – 2013.

In my President's overview last year I referred to the inexpressible sorrow that we all felt at the loss of our close friend and former President, Gerry O'Connor. Gerry was involved in everything that was positive in our industry in the last twenty years. Following discussions with Gerry's wife, Elizabeth, the Federation proposes to announce at its annual conference in March a memorial scholarship in Gerry's memory. We believe that the scheme will perpetuate his contribution to Irish hospitality.

My term of office has come to an end very quickly and I now wish to express my appreciation to all those who assisted me over the last two years. I was privileged to have as Vice Presidents - Matthew Ryan, John Gately, Joe O'Brien and Julie Gilhooly. The Council of the Federation, the Management Committee and all the other sub committees of Council were most supportive and diligently carried out their functions. I also thank the membership in general who supported the Federation and me whenever I requested it. The Chief Executive and staff at Northbrook Road gave unlimited support at all times. I wish every success to our incoming President, who I know, with support of Council members, will continue to lead the Federation to further achievements in the future.



Richard Bourke
President



**IHF CHIEF EXECUTIVE,
JOHN POWER**

Early indications for 2005 are that overseas visitor numbers increased by 6% to €6.77 million, with revenue including Irish carrier receipts amounting to approximately €4.25 billion. When this figure is combined with an estimated 6% growth in revenue from domestic trips, the total tourism earnings were €5.35 billion. The government earned a massive €2.4 billion through taxation on tourism expenditure from which approximately €2 billion came from foreign tourism.

Membership

The Irish Hotels Federation has 948 members, made up of 670 hotels and 278 guesthouses.

The Irish Hotel and Guesthouse Industry

Ireland has at present 870 hotels with 47,000 bedrooms and 440 guesthouses with 5,000 bedrooms. There are 57,000 people employed in hotels and guesthouses.

Employment Issues

The current national partnership agreement - Sustaining Progress, is now coming to the end of its three year term. It is anticipated that talks on a successive agreement will commence in early 2006. The Employment Regulation Order (JLC) in respect of hotels, except those situated in Dublin and Cork cities and the Borough of Dun Laoghaire, set the legal minimum wage for employees in the various categories of the sector with effect from 23rd September 2005, 3rd January 2006 and 3rd July 2006 respectively. It is anticipated that a successor to this JLC, based on whatever wage adjustments are agreed in any successor to Sustaining Progress will be effective from January 2007. To our consternation, in May 2005, the national minimum wage rate was increased by over 9% to €7.65 per hour. To

exacerbate this further, the JLC further increased rates affected by the minimum wage adjustment by applying the second phase of Sustaining Progress. The net affect of these cumulative adjustments were increases in the statutory wage rates of in excess of 14% in the two years from July 2004 in respect of over half of the sectors covered by the JLC. As part of the negotiation of any successor to Sustaining Progress, we have made strong representations that any further review of the national minimum wage rate should be negotiated as part of a new national agreement and that safeguards be put in place to avoid two mechanisms being used to increase wages as happened during 2005. It is also our contention that the statutory allowances in respect of board and lodgings, which were set at the time of the introduction of the national minimum wage rate in 2000, should now be adjusted to, at least, take account of inflation. A submission to this effect will be made to the Minister for Enterprise, Trade and Employment at the time of the next review of national minimum wage rate.

Quality Employer Programme

The Quality Employer Programme (QEP) continues to offer guidance and direction on human resource and personnel matters. The programme has led to increased awareness among Irish hospitality providers of the value of implementing a structured human resource system, not least in the benefits of attracting and retaining employees in an environment of increasing competitiveness. It is now nine years since QEP was first implemented and it is a credit to the programme that it has almost become an industry standard. To date, almost two thirds of members are accredited as Quality Employers and most other members are working towards accreditation. One of the main qualities of the programme is that it can be implemented at the employer's own pace and a QEP facilitator is always on hand to offer any assistance necessary. Many changes and updates have taken place since the programme's inception in 1996. Most of these changes occurred in order to remain in line with changing legislation and in response to the changing needs of our members. In 2005, the online re-assessment questionnaire was piloted across QEP properties. This new re-assessment tool allows properties to assess themselves via an online questionnaire which is then returned to the IHF, where answers are evaluated against QEP criteria. This new technology is being used as a follow-up tool to ensure properties are maintaining compliance with the necessary policies and procedures of the Quality Employer Programme.

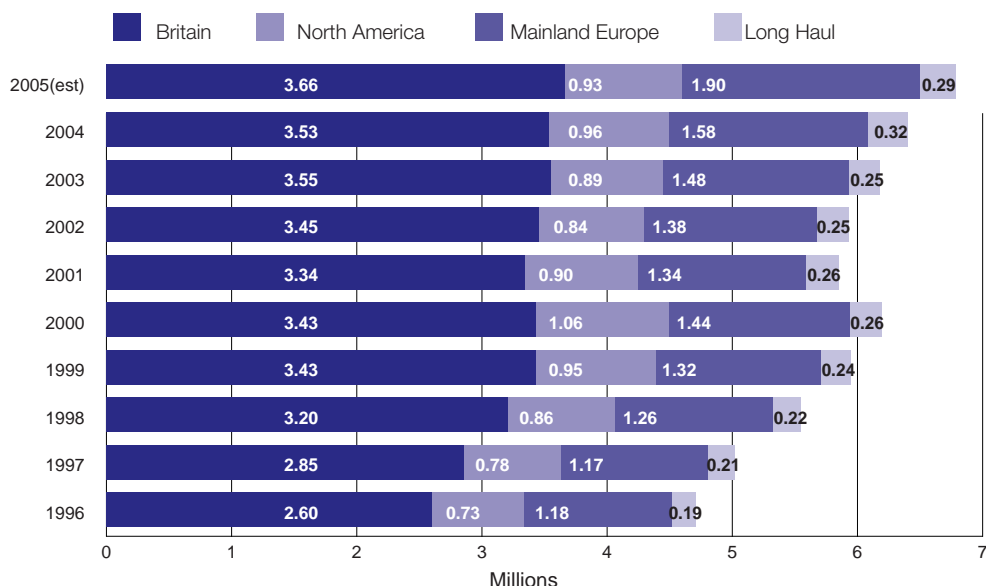
Irelandhotels.com & Be Our Guest

The value of business booked on the Irelandhotels.com website continues to grow. In the 2005 calendar year, the volume of bookings on the site increased by 93% to 14,000 with the value of these bookings increasing by 95% to €3.2 million. The success of this website and its potential for future growth depends on two issues; how effectively the Federation promotes the website and how actively our members ensure that competitive rates are available on the site. In conjunction with In1Solutions, the contractor providing the booking engine on the website, we have recently conducted a number of workshops throughout the country highlighting how participating properties can best take advantage of the enormous facility that

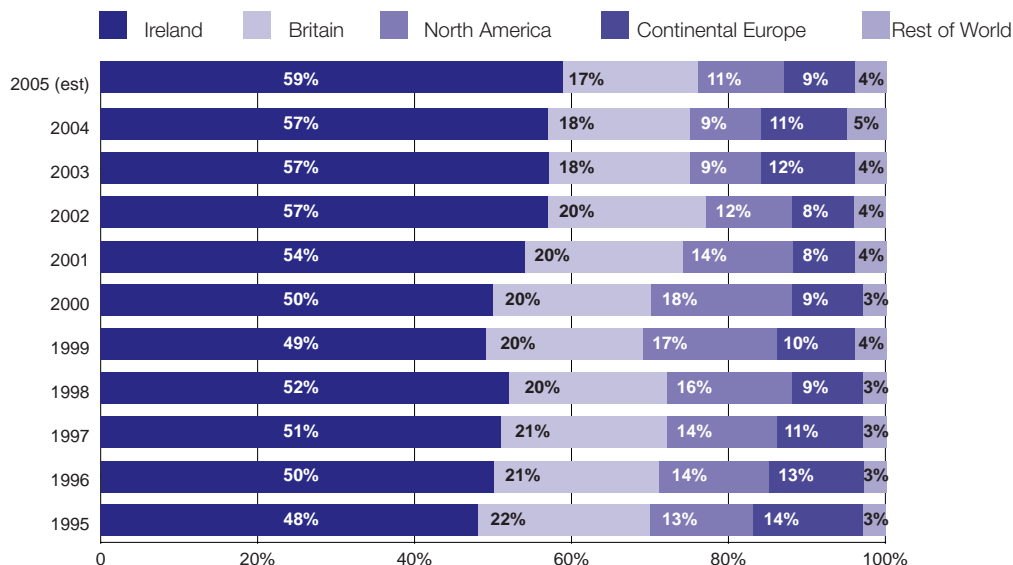
Irelandhotels.com is. During the year, the administration section of the website was updated and it now easy for participating members to obtain details of all transactions in respect of their properties. We are continuously seeking opportunities to promote awareness of the site and during 2005, Irelandhotels.com obtained direct links from the websites of both Tourism Ireland Ltd – www.discoverireland.com and Fáilte Ireland - www.ireland.ie.

The Be Our Guest guide continues to be the leading and most comprehensive guide to guesthouses and hotels in Ireland. 340,000 copies were distributed both in Ireland and overseas in 2005. Entry into the Be Our Guest guide ensures automatic appearance on the Irelandhotels.com website and on its online reservations system.

Overseas Visitors 1996-2005 (millions)



Nationality of Hotel Guests 1995 - 2005





Tourism Ireland

Tourism Ireland – the joint North /South agency responsible for the promotion overseas of the island of Ireland estimates that the visitor arrivals in 2005 were 8.1 million people, an increase of 8.5% on 2004. The target for 2006 is a further increase of 5.2% to 8.6 million, with arrivals from Britain targeted to increase by 3%, mainland Europe by 8.4% and North America by 8.5%. In response to the challenges identified in 2004, Tourism Ireland and an industry steering group set out to review the Great Britain market and arising from this review, a new strategy – *"Restoring Growth from the British Market"* was launched in March 2005. This strategy identified the challenge in 2006 to maintain and grow this mature market against the backdrop of difficult market conditions. A new integrated marketing communications campaign has already commenced. The best prospects have been identified as sightseers and culture seekers i.e. people who like to learn about a country and its culture, enjoy visiting historic sites and sightsee while on holiday. There is a focus on promoting all the regions of the island of Ireland and particularly highlighting the regions that have direct access from Britain. The year round advertising presence will be maintained and a wide range of cooperative opportunities for interested partners to deliver strong destination messages supported by attractive offers will be provided. The staffing structure of the British market office has been reorganised to implement the new strategy. The Federation is represented and actively participates on three separate working groups which work with Tourism Ireland in delivering this strategy - The Car Touring Promotion, the Dublin Reinvigoration Taskforce and Industry Empowerment Working Group, which focuses on targeting repeat visitors, encouraging short break visitors to stay longer and maximising positive word of mouth.

Tourism Ireland has a fund of €64 million in 2006 to carry out overseas marketing for the island of Ireland and will be investing 40% of this in Great Britain, 32% in Europe and 23% in North America and 5% in new and developing markets. 65% of overseas marketing expenditure is likely to be spent on advertising which includes TV, radio, print, poster, cinema and corporate advertising to the trade.

The Federation is represented on a steering group advising on the development of a new e-marketing strategy which will serve Irish tourism in the international marketplace over the next three years. Tourism Ireland is investing €2.6 million to develop a next generation website to ensure that there is a consumer focussed tourism website promoting the Irish tourist product. Mr. Simon Gregory, formerly Head of the British Market Office for Tourism Ireland and now Director of Brand Developments and Markets has agreed to join the IHF Marketing Committee and we look forward to his valuable contribution.

Following the valuable information obtained during the Project Britain research, a similar exercise has now commenced in the US market and a steering group has been set up. The Federation is represented on this group by its President Richard Bourke. It is anticipated that this project will be completed in the early part of 2006.

Fáilte Ireland

The Federation continues to work in strategic partnership with Fáilte Ireland and many meetings and discussions took place in 2005 on a number of issues. These issues covered the development of people and business skills, the provision of practical business supports to industry, standards and the promotion of best practice, innovation and product development, effective advertising of home holidays, product promotion, regional marketing and the maintenance of vigilance on environmental issues likely to affect tourism.

During the year, a Tourism Product Development Strategy Review Group was set up under the chairmanship of Mr Dan Flinter, the former CEO of Enterprise Ireland. The Federation is represented on this group by John Brennan of the Park Hotel Kenmare, Brian Britton of the Sandhouse Hotel, Rossnowlagh, Samantha Leslie of Castle Leslie and myself. Its objective is to bring forward a strategy and approach for product development which takes account of the targets set out in *New Horizons for Irish Tourism*. In conjunction with this initiative, a nationwide audit of the tourism product offering has been commissioned and consultants have been retained to evolve a strategy. The overall thrust of the exercise is to focus and present our tourism offering in a most appealing manner to customers and potential customers.

Mr. Paul Keeley, Director of Marketing, Fáilte Ireland has agreed to join the IHF Marketing Committee and we look forward to his valuable contribution.

Fáilte Ireland invested €4.3 million in promoting domestic tourism in 2005. 6,000 people trained for careers in tourism in 80 locations throughout the country including 11 Institutes of Technology. A further 5,000 agency staff attended Fáilte Ireland in-service development programmes. The Careers Roadshow attracted a potential 6,000 entrants to the industry, 24 major sporting events were supported including the Smurfit European Open, Nissan Irish Open, Early Ireland, British Super bikes and the Dublin Horse Show. Fáilte Ireland's Regional Tourism Authorities drew grant funding of €3.4 million and provided financial assistance to 144 festivals including the Tall Ships Race in Waterford, St. Patrick's Festival and Cork 2005 European Capital of Culture. In association with Tourism Ireland, 1,300 overseas journalists from all key markets

visited Ireland and it is estimated that the media generated from such visits had a value of in excess €50 million.

Business Tourism

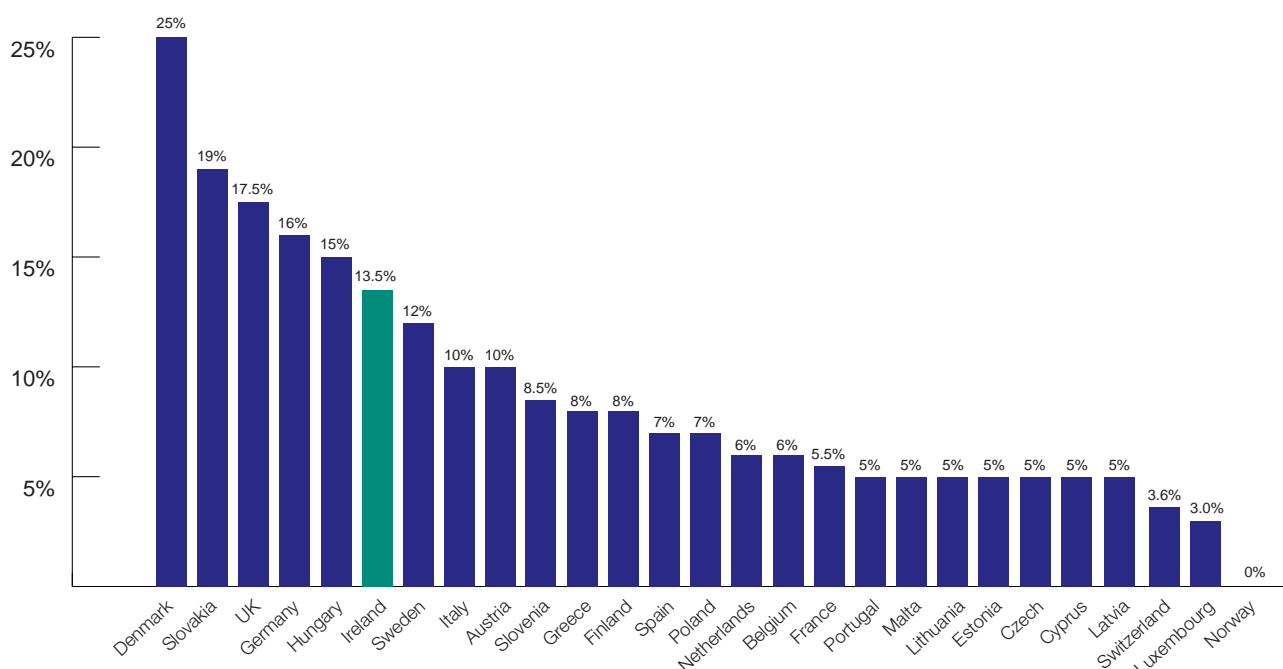
The Business Tourism Forum, established by Fáilte Ireland in 2004 under the chairmanship of Peter Malone, met on a number of occasions throughout the year. A number of achievements in 2005 under its direction included the unveiling of a new trade stand at Motivation in Chicago in October and at EIBTM in Barcelona. Work is continuing on the development of a new business tourism brand, the launch of which is expected in early 2006. Progress is also being made on the establishment of a coordinated database which will serve both Tourism Ireland and Fáilte Ireland and the Convention Bureaux in their quest to more effectively promote Ireland as a destination for association conferences, incentives and corporate meetings. The business plan for 2006 is presently being finalised and discussions are taking place with industry subgroups, including a group concentrating on association conferences under the chairmanship of IHF Council member Matthew Ryan. A major objective of the Business Tourism Forum is the establishment of an effective structure which efficiently coordinates the activities of Tourism Ireland, Fáilte Ireland and the regional convention bureaux in order to reduce any element of duplication of functions and to maximise the benefits of the limited resources available. Dublin Convention Bureau, which is a joint initiative funded

by the IHF Dublin Branch, the Association of Irish Professional Conference Organisers, Dublin City Council and Dublin Tourism and which is under the chairmanship of Clive Brownlee had a very busy 2005, promoting Dublin as a venue for international conferences, corporate meetings and incentive business. Its Chief Executive, Jean Evans regularly communicates with all the members of the Bureau on the level of activity and action. Due to the close cooperation between the Dublin Convention Bureau and Fáilte Ireland, which will release further resources to promote the objectives of the Bureau, the impact in 2006 will be greatly increased.

Business tourism worldwide has a value of about €40 billion of which Ireland's share is less than 1%. It is the objective of the Business Tourism Forum to increase the value of business tourism in Ireland to €450 million by 2007.

The appointment of a provisional preferred tenderer for the National Conference Centre was major progress during 2005 and it is now hoped that firm contacts for the development of this vital piece of infrastructure will be entered into in the first half of 2006, with hopeful delivery of the facility by some time in 2009. The National Conference Centre is a strategically important element of tourism infrastructure and will, when operational, generate at least €50 million per annum for the economy. The focus is now on securing a definite delivery date and the development of a comprehensive international marketing strategy to

European Countries - VAT on hotel accommodation (%)





announce internationally that Ireland and Dublin have a specific state-of-the-art national conference centre to compete with the best in the world.

Budget 2006

The Federation submitted its pre-budget submission in advance of last December's budget. The Federation focused on three main issues which require immediate attention in order to provide a reasonable economic environment for sustainable growth in Irish tourism. These are; excessive increases in local authority charges and taxes (under the current system there has been a 21.3% increase in local service charges in the year to August 2005, while commercial rates over recent years have greatly exceeded the rate of inflation), the non recoverability by the International conference, incentive and corporate meeting sector of VAT paid on hotel and restaurant costs (the Irish hotel VAT rate of 13.5% is the second highest of the Euro zone nations behind Germany at 16%) and the allocation of an extra €15 million to Fáilte Ireland and Tourism Ireland to allow them increase the effectiveness of the communication to the market of the Irish tourism experience.

Following the publication of the Estimates and the Budget, we welcomed the 12% increase in the tourism marketing fund allocated to frontline tourism marketing - one of the key tenets of our pre-budget submission. These funds together with the private sector marketing campaigns will enable an increase in the current level of promotion both domestically and overseas.

We also acknowledged the clarity given for the phasing out of hotel capital allowances. In addition, we welcomed the increase in the disposable income resulting from changes in personal income tax and childcare provisions and the additional funding for major capital projects which will hopefully speed up the implementation of the Transport 21 initiative, thus easing the difficulties of travelling throughout the country.

We expressed disappointment that the Minister for Finance did not address the serious competitive disadvantage which the Irish VAT system places on business tourism and we are still lobbying to have this issue addressed in the Finance Act.

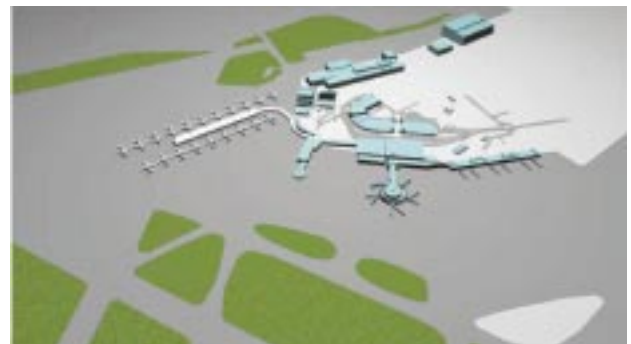
Proposed New Classification System

The Federation has been actively involved, over the last year, in discussions with Fáilte Ireland to develop the criteria for a new classification system. A great deal of research has been carried out into the more modern European classification. The system being developed is a mixture of the Dutch, German and Swiss systems while ensuring that specific product offerings unique to the Irish market are not lost. The proposed system will remain a five category system ranging from one to five stars for hotels and one to four stars for guesthouses. The draft allows for each property to initially rate themselves against the criteria. This will then be verified by an on site visit to the property on an annual basis.

The system will operate on the basis of compulsory criteria which need to be in place in each of the categories and a range of additional points which can be gained where additional services or facilities are provided each category other than five star will also have to achieve a points target. The aim is to make the system highly transparent and as objective as possible.

To date the criteria in the three, four and five star hotel category have been well developed and piloted with members and work has commenced on the two star hotel and guesthouse criteria. The most up to date draft of the proposed criteria is available on the Federation's website www.ihf.ie. A special meeting of members will be convened in early 2006 to consider the proposed new scheme which is hoped to be operational by mid 2006 and run in parallel with the existing system until the end of 2007.

Air Access / Transport



Dublin Airport's Pier D, 2007

The Federation welcomed the re-negotiation of the US-Ireland bilateral air agreement, which, subject to the EU and US agreeing an 'open skies' policy, which will allow for

increased air routes and new gateways from the US to Ireland. The finalisation of this agreement could give Ireland the potential to double, to two million, the number of US visitors to Ireland by 2012. This would result in almost 150,000 extra US visitors to Ireland each year adding €100 million in revenue to the Irish economy. However, while optimism is high that the re-negotiation of the bilateral air agreement will have a significant positive impact on visitors to Ireland, it will be reliant on airlines seeing the commercial value in new routes.



Western Rail Corridor
(courtesy of the Department of Transport)

The Federation has consistently maintained that the availability of frequent, competitive access to Ireland, particularly on the North Atlantic route, is essential to Ireland's tourism growth, as this is a major factor determining where a tourist chooses to visit.

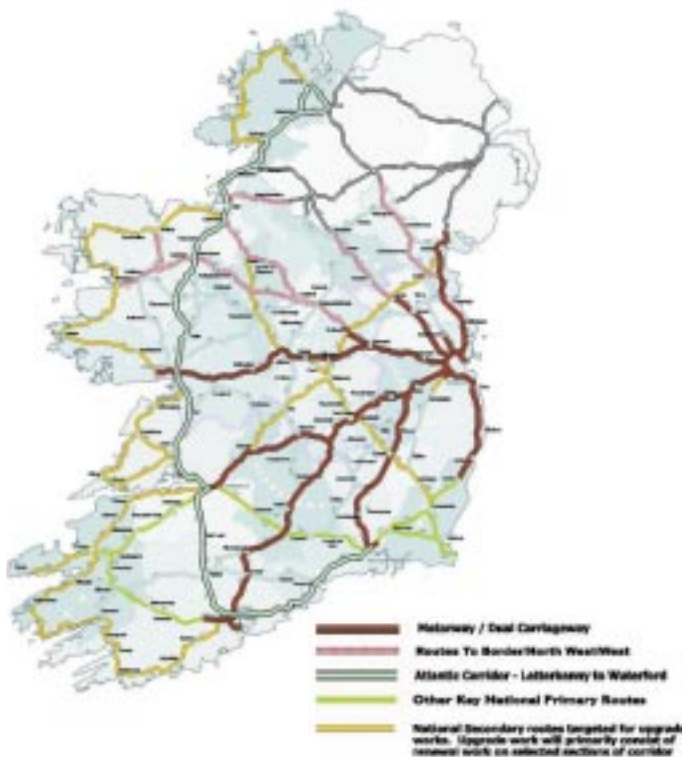
In anticipation of the renegotiated US-Ireland air bilateral agreement and the surge in the number of air routes into Shannon, the Federation is calling on the government to develop and implement an effective strategic state funded plan to sustain and increase the current level of direct transatlantic air traffic to Shannon airport. This strategy should include a specific ring fenced marketing provision of at least €10 million per year for at least five years to primarily target Shannon's offering to the North America market. Immediate action is also required on regional infrastructural road improvements including the upgrade of the Galway - Limerick road, improvement of the rail network and completion of the Dublin - Limerick motorway as per the Government's Transport 21 plan. These projects must have a deadline for completion by the end of 2008 when the new US-Ireland air agreement comes fully into effect.

The Federation is serious concerned that without the implementation of a strategic state funded plan and improvement in regional infrastructure, the new air agreement could have a potentially detrimental impact on the sustainability and growth of economic and tourism sectors in the region. The Federation believes that dedicated marketing efforts specifically promoting the

Shannon region to the US and improved regional transport infrastructure are the two vital elements to ensure that all commercial interests in the Shannon region are given the opportunity to adjust to the air transport environment following the proposed transition period in 2008.

The Federation called during the year for the following specific measures to positively address the challenges ahead for the Shannon Region:

- The allocation of a specific Shannon region marketing fund, which would support the 'Ireland-West' tourism brand abroad and help to market air routes into the region;
- Aer Lingus to give increased exposure to promoting US-Shannon fares in the US;
- A focused marketing campaign in all key overseas destinations that have direct flights into Shannon;
- Urgent acceleration of Transport 21 elements impacting on the Shannon region



National Roads Network
(courtesy of the Department of Transport)

The Federation broadly welcomed the €34.4 billion transport plan - Transport 21 announced by Martin Cullen, T.D., Minister for Transport. Transport 21 will have major benefits for the growth of regional tourism if implemented within the given timeframe. The creation of new regional road and rail access routes will facilitate tourism growth within the regions and assist in reversing the annual decline (10% in 2005) in motoring tourists visiting Ireland with cars.



The Federation congratulated the Dublin Airport Authority on the speedy manner it brought forward its master plan for the airport, following the Government decision on the airport's expansion. We expressed the view it is now the Government's responsibility to ensure that any difficulties, which might be created by the decision of the Airport Regulator on the request for additional airport charges will not delay the delivery of the new Terminal by 2009 and Pier D by 2007.

Salmon Drift Netting

The Federation, together with key tourism bodies (ITIC, RAI and Euro-Torques) continue to lobby for the implementation of a strategy to bring an end to the drift net fishing of salmon. This practice is decimating the salmon stocks in Irish and European rivers and having an enormously detrimental effect on the angling tourism industry. In October, the Federation acknowledged the publication of a report on Salmon Drift Netting, Draft Netting and Angling by the Joint Oireachtas Committee on Communications, Marine and Natural Resources Sub Committee and welcomed the committee's statement in the report that the survival of the salmon species is paramount.

Angling tourism is worth €55 million to the economy each year and the vital importance of this natural tourism asset cannot be overemphasized. However, the Irish tourism industry is very concerned at the negative international press Ireland is receiving for permitting the practice of drift net fishing to continue here. Since 1999 there has been a 50% drop in the number of salmon angling tourists coming to Ireland per year, from 54,000 to 27,000. Every effort must be made to reverse this trend as soon as possible. The Federation is calling for a compensation scheme to be introduced to ensure that drift netting is permanently banned. The 50% drop in angling tourists can clearly be linked to the decline in our salmon stocks and the negative international publicity Ireland has received due to the State's stance on drift netting. Once this practice is eradicated, as outlined in the Committee's report, salmon stocks should increase and the angling tourism industry should be boosted by the positive publicity Ireland will receive for taking these necessary measures.

Overseas angling tourists spend an average of 14.2 days in Ireland, one of the longest lengths of any holiday sector and angling tourists are especially important to rural areas. These points are of particular relevance given the difficulty the tourism industry is currently experiencing in encouraging regional spread and maintaining the length of visitor stay. Another important fact to note is that the average contribution to the economy of a wild salmon caught by an angling tourist is estimated to be €423, compared to €50 for one caught by drift netting.

The quickest and fairest method of eradicating the practice of drift netting is to pay compensation to the anglers. The tourist industry contributes over €2.4 billion annually to the Irish Exchequer, and of every Euro spent in the country by a foreign tourist, over 52 cent ends up with the Exchequer. Therefore, the Government should be the principal financier of any buy-out scheme. The buy out of the drift net salmon licenses should be considered by the Government in the same manner as, and funded in a similar fashion to, the case of the €45 million decommissioning scheme for white fish vessels announced earlier in 2005.

Insurance

As a result of the impact of the enactment of the Civil Liability and Courts Act 2004 and the impact of the Personal Injuries Assessment Board (PIAB) in reducing the cost of settling both employment liability and public liability cases, insurance premiums continue to reduce. Credit must also be paid to the vigilance of the Joint Oireachtas Committee on Enterprise and Small Business under the Chairmanship of Donie Cassidy, T.D., who, through the publication of their Third Interim Report continues to focus on the need to have insurance cover available at an internationally competitive cost.

We have to complement the PIAB on the manner in which it is progressing claims but we expressed concern during the year that the Book of Quantum which they use as a guideline in those settlements, is based on awards given by Irish courts. We believe that this level of settlements is too high and that an exercise should now be carried out to benchmark our levels of settlements with those available in competing countries, particularly in Britain. We will continue to make this case in 2006.

Liquor Licensing

In May 2005 the Minister for Justice, Equality and Law Reform published the general scheme for a new Intoxicating Liquor Bill, the purpose of which is to codify the existing liquor laws. A detailed paper was circulated to our members outlining the details of these proposals, the principal features of which were the introduction of a nightclub permit granted on an annual basis instead of the present monthly special exemption orders and the granting of a licence to guesthouse owners to supply alcohol to residents for consumption on the premises. Having considered the contents of the proposed bill we prepared a detailed submission to the Department addressing areas of concern, many of which were technical. We also urged the Minister to provide that persons under 18 should be allowed in the bar areas of hotels after 9pm (10pm during the period May to September), when they are accompanied by their parents or guardians, for the purpose of consuming



a substantial meal or attending family suitable entertainment. We again drew attention to the unreasonable and impractical requirement, in the absence of a system of mandatory identity cards, the requirement prohibiting persons aged between 18 and 21 from the bar areas of licensed premises after 9pm unless they produce an evidence of age document.

We welcomed the provision which removes the need for hotels to purchase and extinguishing an existence bar license in order to operate a public bar. It is anticipated that a meeting with the Minister for Justice, Equality and Law Reform will take place in the early part of 2006, during which our submission can be discussed in more detail. Through that discussion and ongoing dialogue with officials we will strive to influence the contents of the Bill which is intended to be published in the latter part of 2006.

Irish Tourist Industry Confederation

It was a year of change at ITIC. After fourteen years at the helm, Chief Executive, Brendan Leahy retired. He was replaced by the well-known hotel figure and former president of the Irish Hotels Federation, Eamonn McKeon, who took over the reins in April. Brian Dowling completed his two-year term as Chairman and was succeeded by Catherine Reilly of the Irish Tour Operators Association and Brendan Tours. The IHF President, Richard Bourke, assumed the role of Vice-Chairman.

Throughout the year, ITIC continued its research and lobbying activities on behalf of the Tourist Industry in an effort to influence tourism policy and seek specific supports from Government. A major study into the Regional Distribution of Overseas Holidaymakers, which had commenced in 2004, was completed and launched in June.

Anecdotally, many in the industry had been signalling difficult trading conditions in some of the regions, but the scale of the problem when revealed by the ITIC report was nonetheless dramatic. In the period 1999 to 2003, overseas holiday bednights in Dublin grew by 41%, while in the western regions, they dropped by almost 20%. Most of the fall-off in the west is attributable to the British market and to a lesser extent mainland Europe, and the decline in visitors taking their own car has been particularly acute for the western regions. We are in effect, dealing with two distinct markets, one for city and urban travel, and one for regional and rural-based experiences.

The findings of the report and the considerable media interest, which followed has firmly put the regional distribution issue centre stage. Government, the Tourist

Agencies and Industry are collectively driving initiatives, which will hopefully reverse this trend and while little or no improvement occurred in 2004, there was some cause for optimism in 2005. Much as the decline was gradual, the recovery will not be instant, but a reversal of the trend is beginning to emerge. Direct access to the regions is key, particularly air access.

During the year, ITIC warmly welcomed the overdue development plan for Dublin Airport, and continues to impress upon Government that there can be no slippage in the timetable for the delivery of Terminal Two in 2009. Dublin Airport is a National issue and the Tourist Industry is determined that the present inadequacies must be put right with all haste. In this regard and in light of the unsatisfactory determination by the Aviation Regulator, ITIC has called on the Minister for Transport to take whatever steps are necessary to bring this whole issue quickly and finally to a satisfactory resolution.

During the extremely difficult period, which will be experienced at Dublin Airport until Terminal Two becomes operative, the DAA has agreed to meet quarterly with an Industry delegation from ITIC to try and alleviate problems for visitors and customers of the Airport. The IHF is represented on the Industry group by Mary Buckley of the Crowne Plaza Hotel.

ITIC welcomed the PWC and Travers reports during the year on the restructuring of the Regional Tourist Authorities. An Industry delegation met with the Flood Implementation Group and urged the speedy implementation of the main recommendations. The RTAs can be a source of enormous influence in nurturing product innovation, facilitating enterprise enhancement, and developing sustainable tourism growth in their regions. Clearly the plan will require organisational changes in Fáilte Ireland as well as the regions, but they must be given the resources and encouragement to fulfil their true potential.

A new National Development Plan 2007 – 2013 will be published by Government at the end of this year. ITIC has been invited by the Department of Finance to submit a Tourism Plan as an input to the formulation of the NDP. The services of Tansey, Webster and Associates have been retained to assist in the production of the plan and the IHF is working closely with ITIC and Tansey in the compilation of this very important piece of work.

A major study on Competitiveness in Tourism was commissioned by ITIC in late 2005. Work on this project is well underway and the report should be available in the late spring. Apart from analysing and reporting on the competitive issues and challenges facing Irish tourism, the



report will be prescriptive on recommendations and actions to be taken by industry, Government and tourism agencies. The current perception of competitiveness in Irish tourism is negative, and that issue must be addressed.

ITIC joined with the IHF during the year on several key issues affecting the Industry. Pre-budget submissions called for a reduction in VAT to 12.5% and reform of the non-refundability provisions for VAT, particularly for conference and incentive business. A joint release on the drift netting destruction of the wild Atlantic salmon appears to have struck a chord although a resolution has yet to be found. And the long awaited and overdue announcement of a "provisional preferred tenderer" for the National Conference Centre was widely welcomed by Industry.

ITIC is supporting the IBEC campaign on spiralling local government charges, which is calling for urgent and fundamental change in local authority accountability, funding and efficiency.

A major review of the North American market is underway by Tourism Ireland. The objective is to restore growth to this critical market, which has under performed in recent years and showed an actual decline in 2005. Tourism Ireland and the Consultants, TTC, are working with a steering group from the Industry including IHF President, Richard Bourke. The group expects to report in May.

Tourism Industry concerns are continuously presented by ITIC to a variety of groups including the Tourism Policy Implementation Group, the Tourism Marketing Partnership, Fáilte Ireland, Tourism Ireland and of course, relevant Government Departments. The IHF actively participates with ITIC in many of its submissions to these groups.

Copyright Issues

We understand that most of our members have settled, or are in the process of settling with PPI, the question of outstanding tariffs applicable to nightclubs and discotheques, following the decision of the High Court on the level of equitable remuneration. In conjunction with the Restaurants Association of Ireland, the Irish Nightclub Industry Association, the Licensed Vintners Association and the Vintners Federation of Ireland we are in preliminary discussions with Irish Rights Music Organisation (IMRO) who have requested a substantial increase in their tariff.

We are in constant dialogue with the intellectual property section of the Department of Enterprise, Trade and Employment to ensure that highly complicated legal procedures, be it at EU or national level, do not create further burdens on our members. Much of the activity on

this issue is taking place at European level and through our membership of Hotrec, we are kept both appraised and are actively involved in trying to influence the direction of EU legislation.

Environment and Energy Issues

The Federation has been working on a range of issues over the year aimed at assisting our members in attaining best practice in environmental and energy management. We have co-ordinated our efforts with other state and commercial organisations in order to best use the resources available to us. These include Sustainable Energy Ireland (SEI), Environmental Protection Agency (EPA), Energia, BureauScope, Repak, Race Against Waste, Irish Business Against Litter (IBAL) and Irish Hospitality Institute (IHI).

We launched *A Strategic Guide for Managing Energy for Hotels* at our Annual Conference in March. It was produced in conjunction with SEI and provided relevant information for hoteliers to put effective energy management policies and procedures in place. It was distributed free to all our members and they found the 'top tips for energy efficiency' particularly useful and practical.

We negotiated with Energia, the independent energy supply provider, a special offer for our members which gave them 5-10% savings on their energy costs with this reduced cost to be fixed for a period of 2 years. Almost 200 of our members have signed up for this offer to date and many others have used it in order to get a better price from their existing energy suppliers. As part of this agreement, we selected a small number of hotels from the Energia customer base with which to conduct an energy audit. The results of this audit will be used to provide additional advice to our members on how to reduce their energy costs.



Pictured at the announcement of the agreement between the IHF and Energia are: Donal O'Meara, Secretary/Treasurer, IHF and Michael Nugent, Western Regional Manager, Energia

The IHI is being supported on this Cleaner Greener Production Programme by the EPA and SEI. We have supported the IHI by endorsing this programme and to date, 43 hotels have had an environmental review and are in the process of implementing environmental management plans which will result in substantial savings in the cost of their energy, water and waste disposal.

The Federation has worked with SEI in promoting the use of renewable energy sources for our sector. IHF President, Richard Bourke, recently chaired an information briefing on the use of wood pellet heating systems. This briefing was organised by SEI at Inchydoney Island Lodge & Spa who have switched from LPG to a 450kw wood pellet heating system which will result in savings of 40% on fuel costs for the hotel.

We have continued to encourage and assist our members to achieve best practice in waste management and recycling during the year and the Federation's Waste Management Guide CD Rom is a most useful tool to help achieve this aim.



At the Repak Recycling Awards 2005 (l-r) are Mary Fitzgerald, Proprietor, Woodlands Hotel, Adare; Andrew Hetherington, CEO, Repak, Donal O'Meara, IHF, Dick Roche T.D., Minister for Environment, Heritage and Local Government, David Fitzgerald, General Manager, Woodlands Hotel and Brid Duggan, Trainee Manager, Woodlands Hotel.

The number of IHF members who have joined Repak is now close to 150. Both Repak and the IHF are aware that one of the disincentives to joining Repak is the requirement to pay previous years' fees, back to 2003. To help overcome this obstacle, we have negotiated a special arrangement whereby IHF members can join Repak for a fee of €1,000, compared to €2,016 in previous years.

The hospitality sector award was one of the most keenly contested awards of all the categories in the Repak awards. We had joint winners from our membership; the Griffin Hotel Group - Ferrycarrig Hotel in Wexford and the Westin Hotel in Dublin.

In partnership with the Race Against waste project management of the Department of the Environment, we have arranged a series of seminars around the country designed to provide assistance to members in improving waste management in their premises. The seminars include presentations on best practice, a local case study and free CD ROMs on the IHF Waste Management Strategy scheme and the Race Against Waste Guide to Managing Waste in an Organisation/Business.

The IHF has supported this campaign throughout the year and participated in their annual anti litter league awards presentations to local authorities around the country.

Hotrec

Hotrec represents the hotel, restaurant and café sector at European level. Hotrec brings together 36 National Trade and Employer Associations representing the interests of the sector in 22 different European countries.

In 2005, Hotrec held two General Assemblies (GA) and a number of classification and quality taskforce meetings. The GA in London was accompanied by a seminar on the image of the hospitality sector as an employer and there were detailed presentations on hotel classification at the GA in Vienna in October.

Set out hereunder is a brief summary of the issues currently on Hotrec's agenda.

Hotel Classification

In October, the GA reaffirmed Hotrec's opposition to any attempt by public authorities or standardisation bodies to impose a Europe-wide classification system. In the interests of consumers Hotrec member associations agreed to increase transparency by providing information on the meaning of the national classification systems on their own and Hotrec's websites. The GA also approved a series of recommendations for making national classification systems more streamlined.

Taxation

Hotrec published a revised VAT brochure in September. Hotrec continues to strive to obtain the mandatory reduced rate of VAT applicable to hotels and restaurants throughout Europe, by calling for the urgent adoption of the July 2003 Commission proposal in relation to VAT rates. Despite best efforts made by Hotrec, there were no major developments on VAT at European level in 2005. Hotrec will continue to lobby ECOFIN (Council of the Ministers for Economic and Financial Affairs) on this issue in 2006.



Working Time Directive

Hotrec continues to monitor the proposal by the European Commission to revise the working time Directive. Hotrec is concerned about various aspects of the proposed Directive, expressed its position to the European Parliament Employment Committee. Hotrec will continue to monitor the proposal in 2006.

E-learning

Hotrec organised a seminar on e-learning with experts from European countries in September. They discussed the current status of e-learning in the hospitality industry and found that although there is plenty of e-learning material in the market, the challenge is to ensure that it actually reaches the end-users, i.e. workers in the hospitality industry. For this to be achieved, more partnership and dialogue between the stakeholders (e.g. schools, employers etc) is needed. A number of suggestions for possible action at European level were made. Hotrec will continue to analyse the issue of e-learning in 2006 and examine what the European social partners can add to the development and spread of e-learning in the European hospitality industry.

Air Ticket Tax

The introduction of a tax on air tickets to finance development aid was discussed at an informal meeting of EU Finance ministers in September. In October, the GA strongly advised governments against such an initiative. Hotrec's view is that the objective of increasing development aid should be the concern of society as a whole - and should not fall solely on the tourism industry.

Food Issues

A meeting to discuss the latest developments in food matters at EU level was held in September. Discussions were held on the new food hygiene regulations (foodstuffs) to be enforced in 2006, food labelling at EU level, and the EU Action Platform for Diet, Physical Activity and Health (which aims to tackle obesity and brings together all relevant players at EU level).

The Food Advisory Group, of which Hotrec is a member, held its first meeting in July. The Group consists of representatives of the key stakeholders in the food chain and its task will be to advise the European Commission on food safety policy. Hotrec will continue to participate actively in the Group meetings in 2006.

Standards

In a seminar at the GA in October, European and international standardisation bodies presented their activities in the area of services with particular reference to the hospitality industry. A European Commission representative outlined its views on standards for services.

Hotrec voiced the concern that although supposedly voluntary in principle, standards may become de facto mandatory as they can easily be integrated into the law. The GA subsequently adopted a position stressing that standards, whenever useful, should be developed only on the industry's initiative and following a process of full transparency.

Copyright

The EU Commission has been examining aspects of copyright and the operation of copyright collection agencies. The September 2005 draft of the EU Commission Working Document set out a new strategy geared towards the interests of right holders rather than of users. The document is currently in the review process but if approved, the measures will take the form of a Commission Recommendation (a non-binding instrument) to the EU member States. Hotrec has submitted critical comments to the EU Commission Copyright Unit concerning its plans on copyright management and has asked the Commission for a more balanced proposal which takes into account the concerns of users. It also questioned whether a non-binding instrument would have the desired impact.

Quality Reference Scheme

In October, the GA agreed on criteria for a Hotrec umbrella quality management scheme, intended for use as a reference model at European level. The intention is not to replace the numerous existing schemes at national/regional level but to create a system for evaluating these. National/regional management programmes which meet the criteria will be recognised as Hotrec quality schemes.

Tourism Policy Review Group

During the year the Federation had a number of meetings with the Tourism Action Plan Implementation Group and made a number of submissions outlining the progress which had been made by the Federation on the areas in which it has responsibility. Our submissions to this group included action taken by the Federation on issues such as lobbying on capital allowances, our call for the removal of the anomaly which prevents the reclaim of VAT on hotel expenses incurred by registered businesses while attending conferences, corporate meetings of incentive travel events, our policy on insurance costs, the activities on Irelandhotels.com and support received from our members regarding the availability of very attractive offers on the website.

The submission also covered issues such as actions regarding the environment and the Federation's arrangement with Energia, concern at the way in which the Hotels JLC and minimum wage rates were calculated and our participation with Fáilte Ireland and Tourism Ireland in

the benchmarking of competitiveness exercises. Also included was information on the development of Irelandhotels.com in the area of customer relationship management, details of training activities and seminars carried out by the Federation including the e-management seminar and the negotiation, leadership and conflict resolution courses arranged in conjunction with Hibernia College. We informed the Group on the development in our efforts to update the hotel and guesthouse classification systems and of our participation in Competing Through People, the publication in conjunction with Fáilte Ireland of the *Get a Life... in Tourism* magazine and the utilisation of the Interact programme to enable our members to measure and identify their current practices in relation to cultural diversity. Our Manager of Strategic Issues, Anne O'Carroll now devotes most of her time addressing those areas/initiatives raised in the Tourism Policy Review Group action plan, most of which coincide with those originally identified in the Federation's own strategic review *Blueprint for the Future*.

Branch Activities



Galway Branch Members Elected in 2005
(l-r) John F. Bourke, Siobhan Maher, Mary O'Higgins
and Brian Hughes

The staff at Northbrook Road and I attended meetings at branch level. These meetings gave us an opportunity to stay in touch with our membership on the ground and to listen to concerns and views. Seminars and workshops took place on such issues as Irelandhotels.com and cultural diversity. A survey was carried out among out members in the South East branch regarding the effectiveness of the branch and a summary of the findings of this survey, which may be helpful to the members in other branches, is included in this report.

Associate Members

We continue to promote associate membership and we currently have 76 members. Their association with the Federation has been of great benefit to us and we urge our members to support them where appropriate.

Appreciation

I wish to thank our President, Richard Bourke for the enormous assistance, support and guidance which he has given me and the staff at Northbrook Road during his two years in office. His accessibility, encouragement and willingness to travel in order to lead and support the activities of the Federation serve to inspire and motivate us all.

The guidance and support that Federation management and staff receive from Council, Management Committee, subcommittees and general membership of the Federation is always helpful and most welcome. The willingness of so many members to actively lobby when requested to do so always helps strengthen the profile and impact of such lobbying.

As usual, the staff at Northbrook Road displayed dedication, patience and support without which my role would not have been effective and for this I am truly grateful.

John Power
Chief Executive



irelandhotels.com

One source - Endless possibilities



Over 2005 the Irish Hotels Federation's web initiative, www.irelandhotels.com continued to gain momentum and by the end of the year had further gone from strength to strength. The site continues to influence its visitors to book, enquire with properties directly or hyperlink to properties own websites.

To be listed on Irelandhotels.com, all premises must be a current entrant in the Be Our Guest guide and all content displayed on Irelandhotels.com comes from the Be Our

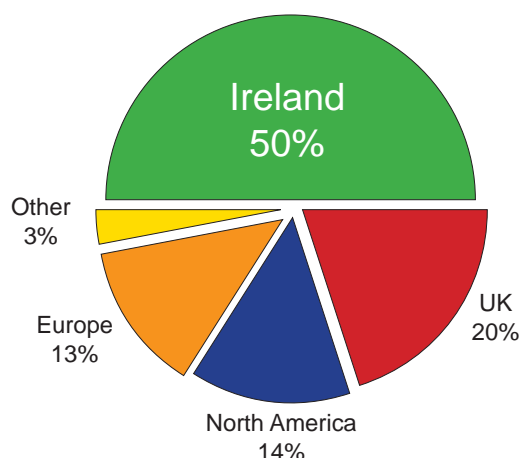
Guest guide. Therefore, the web address of each property is also available to visitors on the property's specific page on Irelandhotels.com. By allowing hyperlinks through to member's own websites, Irelandhotels.com drives on average 32,000 or over 30% of all its visitors to individual hotels and guesthouses websites every month.

During 2005 the site achieved 1,198,934 unique visitors to the website which resulted in on average over 23,000 unique visitors each week.

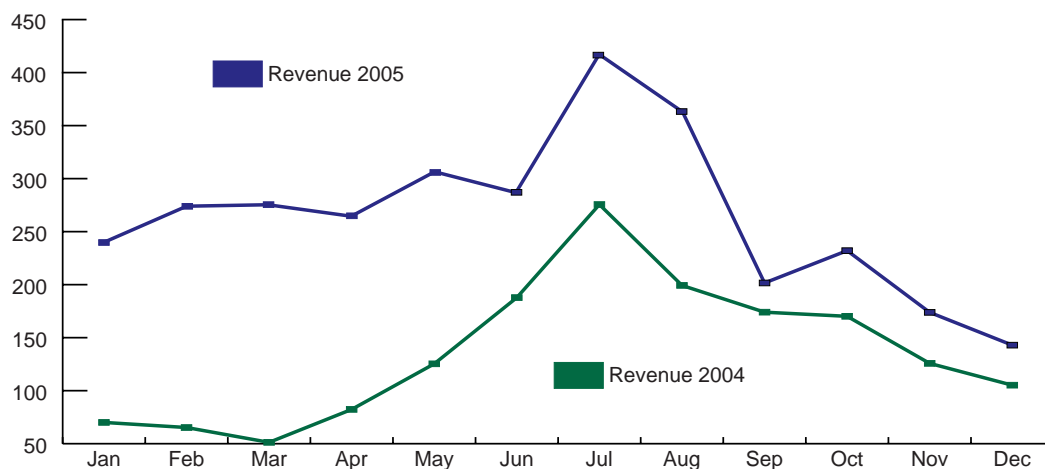
During 2005 there were 13,877 bookings through Irelandhotels.com which represents a 95% increase on 2004. The graph below compares the bookings made during 2005 with 2004:



Bookings from Ireland and Northern Ireland amount to 50% of all bookings on the site. The United Kingdom is the second largest market with 20% of all bookings. North America and Canada account for 14%, of which North American bookings more than dominate the Canadian bookings. Europe contributed 13% of all bookings; the strongest two countries within this continent are Germany and France, in that order. Other countries accounted for 3% of all bookings, of this market Australia accounts for 40% of all other bookings.

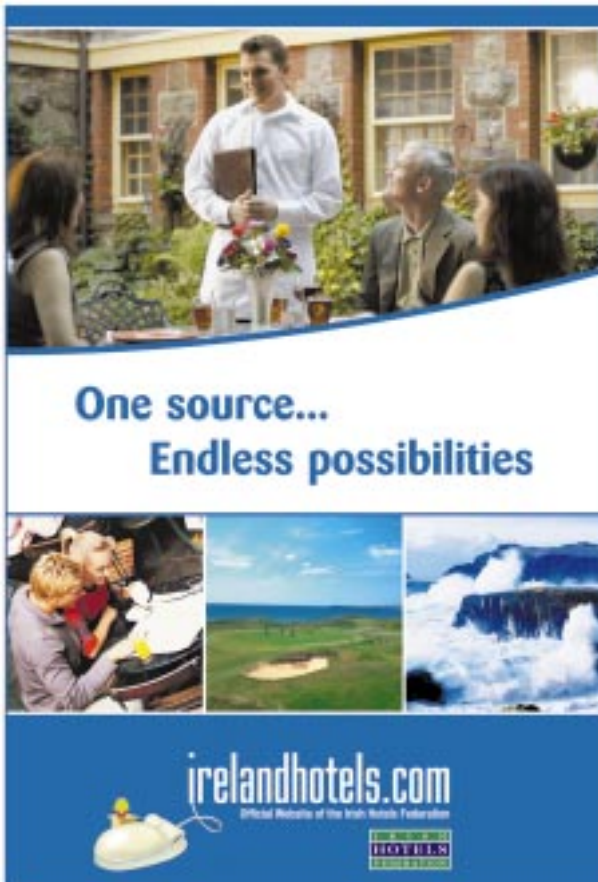


The value of bookings in 2005 was €3,157,756, an increase of 94% on 2004.





As usual Irelandhotels.com has been strongly promoted in both the UK and domestic markets in national press and in targeted publications and media in the US and Europe. Some of these publications include: The Irish Times, Irish Independent, Mail on Sunday, The Guardian, National Club Golfer and Golf Days.



Tourism Ireland



As in previous years, during 2005 the Irish Hotels Federation undertook a number of marketing initiatives such as the inclusion of the Irelandhotels.com booking engine on the Tourism Ireland Websites, the inclusion of a "last minute" section on Irelandhotels.com, the provision of additional property photographs on Irelandhotels.com and the possibility to purchase gift vouchers from the site.

The partnership with Tourism Ireland and its specific regional websites Tourismireland.com went live in August 2005.

Last Minute Initiative

The last minute section of Irelandhotels.com also came into effect in August. This section offers Last Minute rooms for sale to the customer, through a specific branded section on the site.



The aim of this initiative was not to de-value the bookings of rooms currently available on Irelandhotels.com, but to provide properties with the opportunity to offer reduced rates to a section of the market who may be encouraged to take a break based on an offer, rather than the majority of customers who already have a date and location defined and then book an available premises in the area. This facility allowed hotels and guesthouse to provide availability at a specified reduced rate for the next seven days only. Since this initiative went live, there have been 132 bookings which represent 3% of all bookings from that date to the end of 2005.

Additional Property Photos

In order to further improve the value of the site to visitors, in late 2005, members were invited to supply up to three additional photographs of their properties. These photos were then added to each property's specific page on Irelandhotels.com.



Online Gift Vouchers

In October 2005 the IHF, in conjunction with its online booking partner In1 Solutions, began offering a gift voucher system for member properties on Irelandhotels.com. The gift vouchers available can be for cash amounts or for special offers - weekend breaks, health & beauty treatments, dinner for two or any other package that members wish to sell. Once a booking is made for a voucher, the property is notified by email and should then post one of their own gift vouchers to the buyer.



Irelandhotels.com Workshops

During July 2005, the marketing department of the IHF held a number of training workshops for members on how to best manage their availability and rates that were displayed through the booking engine of Irelandhotels.com. The locations for these very successful workshops were Kilkenny, Dublin, Killarney and Galway.



Pictured at the Kilkenny Workshop (l-r) Noreen O'Shea, O'Shea's Hotel, Therese Joyce, Three Rivers Guest House and Jackie Toner, Lacken House

Be Our Guest Guide 2005

The Be Our Guest Guide is produced annually by the Federation to promote and market the interests of Irish hotels and guesthouses on a world wide basis. 340,000 copies of the full colour guide, which included over 1,000 premises, were printed in 2005. Whilst the guide has had, for some years, special sections on Golf, Angling and Conferences, a new section was added in 2005 featuring Spa & Leisure Facilities - which in tandem with a Spa section on Irelandhotels.com reflected the growth of interest in this area.



The Be Our Guest Guide is an all Ireland publication and is defined by Fáilte Ireland and Tourism Ireland as the core guide for our sector of industry. As such, it is the definitive publication offered to both consumer and trade.

Domestic channels of distribution incorporate Fáilte Ireland, Northern Ireland Tourist Board,

Regional Tourism Authorities, book shops, car hire companies, travel trade, Guinness Storehouse and IHF promotions. A substantial quantity of guides is also made available to guests in our members' premises via the bedrooms.

Overseas, the guide is distributed in 20 markets where Tourism Ireland has a presence. In 2005, this allocation amounted to 192,000 copies. In the UK, being the largest market with 100,000 copies, additional ad hoc initiatives were undertaken with Tourism Ireland to ensure a focused strategy of distribution. These very successful cooperative ventures included placement of guides and specially produced beer mats featuring our website in 100 Midlands golf clubs, mailshots to British Tourist Information Centres, guides at Riverdance performances and guides at the ferry ports and in service stations.

In 2005, The Federation took their own stands in the domestic market and participated with Tourism Ireland at a wide range of both trade and consumer promotions listed below, with particular emphasis on countries with new direct access routes to Ireland.

Promotions Attended in 2005

January

Manchester, UK
MATKA, Finland
CMT Stuttgart, Germany
Holiday World Belfast
Holiday World Dublin
Glasgow, UK



February

Brussels, Belgium
USA Travel Agent Seminars
Rotterdam & Amsterdam, Netherlands
Bournemouth, UK
CBR Munich, Germany
BIT Milan, Italy
Experience Ireland Roadshow, Germany
Prague, Czech Republic

March

Canada Agents Seminars
Manchester, UK
ITB Berlin, Germany
London St Patricks Day, UK
SMT Paris, France
TUR Gothenburg, Sweden

May

Ireland Travel Trade Workshop, Dublin
SITC Barcelona, Spain

June

National Country Fair, Offaly
Birmingham BBC Gardeners World Show, UK

November

World Travel Market London, UK
BBC Good Food Show, UK

Be Our Guest Guide 2006 - Distribution Plan

350,000 (10,000 more than 2005) copies have been printed. This increase is to allow for anticipated extra demand due to Ireland hosting The Ryder Cup, as well as Tourism Ireland increase and greater number of bedroom copies. The demand for a highly informative, colourful and well designed A5 sized print guide to Irish hotels and guesthouses is as strong as ever.



Pictured teeing off from the 19th hole at the launch of the 19th edition of the Be Our Guest Guide are (l-r) Dennis Markey, Trade Relations Director, Diageo Ireland, Andrea Roche, Minister John O'Donoghue, T.D., Richard Bourke, President, IHF and Roberta Rowat.

During 2005 Employment Services concentrated on expanding and refining our existing programmes.

Quality Employer Programme



The Hotel industry in Ireland has made great strides to become a 'best practice' employer and the Quality Employer Programme continues to be one of the major drivers in this endeavour. Members are becoming more aware that they are operating in a highly regulated environment and desirable as this is it also represents a challenge for some members. The Quality Employer Programme therefore has been found to provide direction and has helped members to develop a structured HR system suitable for the hospitality industry which is flexible enough to be implemented in a property whether it has five employees or 105.

Last year the Quality Employer Programme focused on perfecting the new on line assessment process. This is a self-assessment questionnaire which can be easily accessed through the internet and is used when a property's re-assessment is due. This alternative method of re-assessment has proved beneficial in many ways, but importantly it means that the IHF can assess all properties when they are due thus ensuring that properties keep up to date on any new legislation or any new HR procedures which they might need to implement.

Almost two thirds of members are seeing the benefits of being a Quality Employer Programme accredited property and not only does the award enhance the reputation of the organization but it is worth remembering that as a Quality Employer Programme employer you are helping to showcase the hospitality industry as a first-choice employer.

Career/Recruitment Events

As in other years the IHF continued to maintain a presence at career events. On some occasions we shared a stand with Fáilte Ireland, usually at the national showcase fairs or managed an IHF stand at the smaller regional fairs. Career Fairs provide opportunity for on-the-spot recruitment and selection and also ensure that young people and those considering new careers are made aware of the diverse career opportunities available in the hospitality industry.

FÁS Opportunities - Education and Skills Fair 2005

There was an early start to career events in 2005 with FÁS Opportunities taking place in January this year. Croke Park Exhibition Centre was the location again this year for one of the leading recruitment fairs in Ireland. This year the event was divided into three separate areas, the Careers Village,

the Education Village and the Skills Village – with the Fáilte Ireland Stand located in the 'Education Village' at the canal end of Croke Park. The Fair continues to attract high numbers of job and education seekers with over 80,000 visitors over the 4 day period. The hotel industry was well represented on the stand with personnel currently working in the industry helping out during the fair.

Irish Times Higher Options 2005

This annual event took place in the RDS in September. This is the fair's nineteenth year and has become one of the most important dates in schools' career diaries. As is the case every year the event attracted students and career guidance counsellors, as well as mature students from schools all over the country. It is estimated that 10,000 students attended the fair each day. The Fáilte Ireland stand provided an opportunity for school leavers and mature students to discover new career directions and to become more familiar with career paths within the tourism industry. As in every other year industry representatives from various hotels were on hand to answer specific questions about the hotel industry.

Cork Career Options 2005

The IHF was also represented at this event in the Rochestown Park Conference Centre. The event, organised by the Cork Career Guidance Counsellors, attracted students from nearly all of Cork's Secondary Schools and it is estimated that over 7,200 students visited over the two day period.



Donal Murphy and Claire Cullinane of Rochestown Park Hotel at Cork Career Options 2005.

National Tourism Careers Festival

November saw the launch of the festival which ran for five days in various venues in Dublin, Waterford, Cork, Tralee and Galway. It was an action packed week involving a full programme of events which ranged from college open days and buddy taster days, which involved students shadowing a hotel employee in a chosen department for a day to games where students competed against the clock in areas such as napkin folding and making non-alcoholic cocktails etc. The ever popular and successful 'Go Places in Tourism Roadshows' also took place during this week. Overall, over 2,000 second level students participated and 70 hotels were involved either hosting events or participating in the events.

Get a Life... in Tourism

The 6th Edition of the IHF / Fáilte Ireland career magazine *Get a Life... in Tourism* was published this year. It has a print run of over 25,000 copies and is circulated to all secondary schools, career guidance counsellors and is distributed at all career fairs and career events during the year. It is a useful marketing tool for the industry aimed at 15-18 year olds making that vital career or 3rd level course decision.



The magazine got a bright new look this year and was completely redesigned making it a much more user friendly source of information. Each of the major careers available in the industry has a separate section allowing the magazine to showcase that particular career giving examples of career paths available, courses to attend, a day in the life of profiles along with other useful information for the student. In addition *Get a Life* has all the other useful information

available in previous years such as tourism facts and figures, salary scales, contact details for colleges, full course information and much more.

Placement Services

Through out 2005 the IHF continued to offer a limited recruitment service in order to locate skilled staff in response to our members' needs. Last year most of these employees were recruited from various hospitality and catering colleges which the IHF has forged a link with over the last few years. It is encouraging to know that most of these trainees have specified Ireland as a first choice country in which to carry out their placement.

Once such college which we have been developing a relationship with over the last three years is De Rooi Pannen Tourism College in the Netherlands. Students from this college were placed in hotels throughout Ireland mostly in the accommodation and food and beverage department. Their placement period runs from late April / early May until end October.

In order to meet our members' demand for chefs we had to go further afield. To this end we initiated a pilot project involving commis chefs from Bangladesh. Naturally this meant becoming involved in the work permit process but eventually we were granted permission to recruit ten 3rd Year commis chefs from the Professional Skills Development Institute in Bangladesh. All commis were successfully placed and most are choosing to remain in Ireland for another year in order to gain as much experience as possible. It is expected that we will continue this project for the coming season.

National Recruitment Plan

In 2005 the IHF participated on a committee established by Fáilte Ireland and comprised of representatives from trade associations, industry, colleges, career guidance counsellors, students and community groups. This group was called the Tourism Careers Promotion Group and the work of this group lead to the development of the National Recruitment Plan. The plan is specifically aimed at the tourism and hospitality sector and sets out the priorities and actions needed for industry stakeholders to address current and future recruitment and staff retention issues within the industry. It seeks to intensify and strengthen links between industry, schools, local communities and guidance counsellors.

For the Irish tourism industry to be successful there must be professional, motivated and enthusiastic employees. However, attracting and retaining such qualified and

experienced staff is a significant and ongoing challenge. A recent human resources development strategy published by Fáilte Ireland, indicated a further 6,000 new entrants per annum are needed in the traditional tourism and hospitality occupations to sustain the tourism industry.

There are four key focus points outlined in the report;

1. The image of the industry
2. Availability of careers information and how it is communicated
3. How career opportunities are marketed
4. Review of recruitment and retention in the hospitality sector.

A number of activities were highlighted as requiring action and the committee are working through these currently. Some of the areas already actioned are;

1. Re-development of *Get a Life... in Tourism* magazine
2. New course brochures and prospectus for Fáilte Ireland
3. Completely revamped national careers week
4. More ongoing interaction with Guidance Counsellor organisations and local communities.
5. Development of a new careers CD ROM
6. Development of structured career paths

Catering For Success - Employment Services Sponsorship

Employment Services continued its sponsorship of the 'Schools Completion Programme' throughout 2005. This programme which was developed as part of the Department of Education and Science's early intervention policy is aimed at young people who may be at a socio-economic disadvantage. The objective of the programme is to maximise young people's participation in education and combat early school leaving.



Anne O'Carroll, Manager of Strategic Issues, IHF and students from St. Joseph's School, Coolock, Dublin.

'Catering for Success' is one module of the programme which encourages students to learn through the medium of cooking. Students participating in this course are at primary level, usually between the ages of 9 and 13 and the course takes place in a Fáilte Ireland Training Centre. The social and practical nature of the module has proved most appealing to the young people involved. As well as learning life enhancing skills such as nutrition and good eating habits they also experience the workings of a professional kitchen and are exposed to life at a third level institution.

The programme takes place over a five week period and culminates in a 'Graduation Ceremony' which involves the students cooking and presenting a meal for their parents and teachers. The students are then awarded a certificate which is presented by an IHF representative who has judged their culinary handiwork.

Overall four schools participated in the programme last year, two from Dublin, St. Joseph's School, Coolock and St. Francis School also from Coolock along with two schools from Limerick, Our Lady of Lourdes, Rosbrien and Croom National School. The IHF sponsored a day out for the students from all four schools. The schools from Dublin enjoyed a day at the National Aquatic Centre while the schools from Limerick enjoyed a day's bowling and a trip to the AquaDome in Tralee.

This was the second year of IHF sponsorship of this highly commendable programme and feedback from teachers, students and Fáilte Ireland Trainers has been exceptionally positive.

Education and Training



Graduation Class of the first Masters in Hospitality Management
Front Row (l-r) Anne Gill, Jane Short, Gillian Butler.
Back Row (l-r) Pat O'Shea, Stephen O'Connell and Adrian Noonan.



Online Masters in Hospitality Management

This programme was introduced just over three years ago and is ground breaking as it is the first masters programme of its type anywhere in the world. Provided by Hibernia College, this is an online masters course developed to specifically centre on all aspects of the hospitality industry. The programme allows hospitality professionals, regardless of their location in the country to participate and gain an internationally recognised masters qualification whilst still working.

This year saw the first set of students graduate from the Masters in Hospitality Programme. In total seven students completed the programme for the Graduation ceremony in August and a further 2 graduated in the October ceremony. At the August ceremony Pat O'Shea of the Commodore Hotel in Cobh was voted overall HETAC Student of the Year presented in recognition of his performance in the academic year. He was presented with a specially designed HETAC medal and received a monetary prize. It was a huge honour for him as thousands of people complete HETAC programmes each year. The programme currently has 8 students due to complete the programme in 2006.

Harvard Master Class

10 IHF members completed an intensive week long programme in negotiations, conflict resolution and leadership in Trinity College Dublin in August, presented by the IHF in conjunction with Hibernia College.

The Master Class was presided over by two experts in the field - Dr. Brian Mandell and Eric Berger both from the John F. Kennedy School at Harvard University. The whole approach was highly interactive with a high concentration on case studies and team work. Each day the participants were given a number of negotiation scenarios to work on and these were completed either individually, in pairs or in teams. The learning outcomes at the end of the week were a revelation and the feedback was excellent. All those who participated received a certificate on completion. General consensus at the end of the week was for more similar programmes to be offered. It certainly stretched the mind and had everyone thinking "outside the box".



Harvard Lecturers Dr. Brian Mandell and Eric Berger pictured with IHF President Richard Bourke, IHF Chief Executive John Power and the IHF/Hibernia College graduates

Trainee Manager Development Programme

26 Students received awards at the Trainee Manager Development Programme Graduation Ceremony in Fáilte Ireland in January. This three year programme continues to be one of the more popular industry based courses being offered to those wishing to pursue a career in the management area of the hotel industry. The course entails working on-the-job, with time off to attend lectures in Galway/Mayo Institute of Technology. The programme is run in conjunction with the IHF, Fáilte Ireland, IHI and GMIT and is certified by HETAC.

Time - Management Training Programme for Cross Border Areas

The IHF continued their association this year with the Management Development training programme provided through the TIME project. Over 300 employers and participants in Northern Ireland and the border counties of the Republic have completed the short sharp focused 30 hour training courses this year. Feedback which was carried out independently stressed the low cost, quality and convenience of the training and more importantly the immediate benefits to the business involved as being the key advantages of attending.

The TIME Project is being funded through Cooperation Ireland and the training modules were developed by a consortium drawn from representatives of the major trade associations in hospitality and tourism, working members of the industry and a group of the major training providers. The programmes lead to a professional qualification in Marketing, Managing Business Performance, Human Resource Practices, Staff Training & Development and Aspects of Financial Management. 94% of those attending the programme wanted to complete another programme from the range of courses.

From last September five new courses were added at a higher qualification level. They are Management Strategies, Customer Care, Marketing, People Management and Development & Securing the Competitive Edge.

2006 is the final year of the programme and IHF members in the Cross Border areas are encouraged to send supervisors or managers to the training programmes. This is the last chance to avail of very cost effective management development training which is industry-specific.

Work Permits

The Employment Permits Bill 2005 was published in June and is expected to be enacted this summer. The proposed changes will mainly see clarification and revision of the current application process, an introduction to a 'Green Card' System and will introduce new protection for migrant workers.

The main change in the proposed new work permit system is that either an employer or employee may apply for the permit and that it may be granted for a period of two years and renewed for a three year period. The new legislation will provide though that the Government will retain discretion to identify the sectors and skill needs of individual industries and categories within the industry. In response to this the IHF met with the Minister responsible, and it was conceded that there were particular skill shortages within the industry, most acutely in the kitchen area. The Department has therefore pledged to look favorably upon work permit applications from this area where an employer can prove that the applicant has the prerequisite skills and qualifications to fill the position. Applications must come through the IHF only.

The proposed Green Card System will allow certain skilled employees with a particular earning capacity and from a designated sector to avail of a working visa which will enable them to have complete access to the Irish labour market for a period of two years. Some sectors which will be able to benefit from this system have been mentioned in the document such as financial and medical services but unfortunately the hospitality sector as of yet still remains to be identified as a sector where there is a skills deficit.

The IHF welcomes many aspects of this new proposal, in particular that effected to protect our international workers but our industry continues to face an increase in skill shortages and the Government has as yet to address this problem fully.

Code of Practice for Holiday / Part-Time Employees

The IHF was also involved in developing a Code of Practice for holiday/part-time employees working in the hospitality & tourism industry, aimed at ensuring students have a positive and rewarding working experience while on holiday or part-time work in the hospitality industry. The Code highlights what a young student should expect from an employer in the hospitality industry and encourages employers to use this experience to promote their business as 'an employer of choice'.

Cultural Diversity Strategy & Implementation Plan



Dr. Aileen Pearson-Evans, DCU, Adrian Cummins, IHI, Anne O'Carroll, IHF and Kevin Moriarty, Fáilte Ireland.

In achieving the ambitious visitor and revenue numbers targets outlined in the Tourism Policy Review Group report it is increasingly evident that the contribution of international employees will be a significant and ongoing feature of employment in the hospitality sector. To recognise the importance of international employee the IHF have been very active members on a committee set up by Fáilte Ireland with representatives from the RAI, LVA and VFI.

The outcome has been the publication of a report entitled Cultural Diversity Strategy and Implementation Plan.

Extensive consultation was carried out with industry and international workers from 29 countries currently employed in the industry. While most cited Ireland as a fair place to work offering good opportunities, some of the general concerns of those surveyed include – a need for better information prior to arrival, some felt they were not considered for career development as they are seen as short term employees, varying levels of recognition of cultural differences in the workplace, difficulties with bureaucracy i.e. opening bank accounts, gaining PPS numbers and a need for better Induction training.

A large number of outcomes and recommendations are listed in the report and these are currently being actioned by the committee. Recently a Welcome Workshop was announced. This will be part time with sessions on the Irish tourism product, familiarisation with the local area, Irish Culture, health and safety and customer service.



In addition a full range of brochures and posters are available and have been distributed to the trade associations, schools and colleges, training programmes have been translated into a number of languages, workshops have been held and industry attended to get guidance and helpful hints to ensure best practice cultural diversity.

Most importantly the report contains very useful documents for IHF members to use, i.e. sample induction plans, cultural cues, advice on language training and report from Best Practice hotels in the country.

There is also a very useful tool on the IHF website www.ihf.ie called the Interact Programme. This is an IBEC programme which allows a property to self assess themselves by going through a series of questions on the computer. There is a rating mechanism attached so that a score is given and the property can address the areas not currently in place.

GENERAL MEMBERSHIP

Hotels & Guesthouses

ASSOCIATE MEMBERSHIP

Suppliers & Allied Organisations

BRANCH STRUCTURE

Cork • Donegal • Dublin • Galway • Kerry • Mayo • Midlands • Mourne / Boyne / Lakes
• Shannon • Sligo / Leitrim / North Roscommon • South East • Wicklow

NATIONAL COUNCIL

COMMITTEES

Management
Marketing
Employment
Classification
Tourism Strategic Review
IHF Review
Environment
Food
Licensing
Benevolent Fund

THE EXECUTIVE

Chief Executive

John Power

Secretary / Treasurer

Donal O'Meara

Manager – Strategic Issues

Anne O'Carroll

Accountant

Gary Gallagher

Administration Staff

Joy Bradley
Sara Brazil
Pauline Gannon
Lisa Kearney
Nuala McLoughlin
Ronan Smyth
Miriam Young

OTHER BODIES

Tourism Ireland
Fáilte Ireland
Irish Tourism Industry
Confederation
Hotels/Catering/JLC's
HOTREC – European
Confederation
Business Tourism Forum
IBEC Dublin Executive
Dublin Convention Bureau

NATIONAL COUNCIL 2005/2006



| | |
|-------------------------|---|
| President | Richard Bourke, Jurys Hotel, Ballsbridge, Dublin 4. |
| Vice Presidents | Julie Gilhooly, Hotel Nuremore, Carrickmacross, Co. Monaghan. Joe O'Brien, Tullamore Court Hotel, Tullamore, Co. Offaly. |
| Hon. Treasurer | Annette Devine, Majestic Hotel, Tramore, Co. Waterford. |
| Past Presidents | Pat McCann, Jury's Doyle hotel Group, 146 Pembroke Road, Ballsbridge, Dublin 4. William Power, Tinakilly Country House & Restaurant, Rathnew, Co. Wicklow. Mary Fitzgerald, Fitzgerald's Woodlands House Hotel, Knockanes, Adare, Co. Limerick. Jim Murphy, Premier Business Centre, 12 Lower Hatch Street, Dublin 2. |
| Elected Members | John Brennan Park Hotel Kenmare, Kenmare, Co. Kerry. Paul Gallagher, Buswells Hotel, 23-27 Molesworth Street, Dublin 2. Gerard Hanratty, 50 Dal Riada, Lime Tree Avenue, Portmarnock, Co. Dublin. Martin Holohan, Mespil Hotel, Mespil Road, Dublin 4. Enda Mullin, Westin Hotel, College Green, Dublin. Bernadette Randles, Dromhall Hotel, Muckcross Road, Killarney, Co. Kerry. Matthew Ryan, Grand Hotel, Malahide, Co. Dublin. Thys Vogels, Gresham Metropole, Maccurtain Street, Cork. |
| Co-Opted Members | Michael Rosney, Killeen House, Aghadoe, Killarney, Co. Kerry. Paul Keenan, 29 Shandon Park, Phibsborough, Dublin 7. Michael O'Dowd, O'Connor's Guesthouse, Cloghane, Dingle Peninsula, Co. Kerry. Gillian Butler, Waterford Castle Hotel, The Island, Ballinakill, Waterford. |

NATIONAL COUNCIL 2005/2006 BRANCH REPRESENTATIVES

Cork

John Gately, Vienna Woods Hotel, Glanmire, Co. Cork.
Liam Lally, Rochestown Park Hotel, Douglas, Cork.

Donegal

Paul Diver, Sand House Hotel, Rossnowlagh, Co. Donegal.
Terry McNiff, Mount Errigal Hotel, Ballyraine, Letterkenny, Co. Donegal.

Dublin

Terry McCoy, Redbank Lodge & Restaurant, Skerries, Co. Dublin.
Geraldine Dolan, The Berkeley Court, Lansdowne Road, Ballsbridge, Dublin 4.

Galway

John Bourke, Glenlo Abbey Hotel, Bushypark, Galway.
Brian Hughes, Abbeyglen Castle Hotel, Sky Road, Clifden, Co. Galway.

Kerry

Pat Chawke, Aghadoe Heights Hotel, Killarney, Co. Kerry.
Emer Moynihan, Earls Court House, Woodlawn Junction, Muckcross Road, Killarney, Co. Kerry

Mayo

John Varley, Atlantic Coast Hotel, The Quay, Westport, Co. Mayo.
John Raftery, Downhill Inn, Sligo Road, Ballina, Co. Mayo.

Midlands

Neil Cummins, Prince of Wales Hotel, Church Street, Athlone, Co. Westmeath.
Brian Pierson, Days Hotel, Main Street, Tullamore, Co. Offaly.

Mourne / Boyne / Lakes

Tony Walker, Slieve Russell Hotel, Golf & Country Club, Ballyconnell, Co. Cavan.
Niall Quinn, Ballymascanlon House Hotel, Dundalk, Co. Louth.

Shannon

David Fitzgerald, Fitzgeralds Woodlands Hotel, Knockanes, Adare, Co. Limerick.
Aileen Phelan, Jurys Inn Limerick, Lower Mallow Street, Limerick.

Sligo / Leitrim / North Roscommon

Kevin McGlynn, Sligo Southern Hotel, Strand Hill Road, Sligo.
Joseph Dolan, Bush Hotel, Carrick-On-Shannon, Co. Leitrim.

South East

Peter Wilson, Kilkenny River Court Hotel, The Bridge, John Street, Kilkenny.
Paul McDaid, Faithlegg House Hotel, Faithlegg, Co. Waterford.

Wicklow

Lee Gregson, Glenview Hotel, Glen-O-The-Downs, Delgany, Co. Wicklow

FEDERATION COMMITTEES 2005/2006

Management Committee

Richard Bourke (President)
Julie Gilhooly (Vice President)
Joe O'Brien (Vice President)
Annette Devine, Gerard Hanratty, Paul Keenan,
Matthew Ryan, Michael Rosney

Committee Chairpersons

| | |
|---------------------------------------|----------------------------------|
| Marketing – Geraldine Dolan | Food – Gerard Hanratty |
| Employment – Terry McCoy | Environment – Gerard Hanratty |
| Classification – Richard Bourke | Licensing – Peter McDermott |
| Tourism Strategic Review – Jim Murphy | Benevolent Fund – Richard Bourke |
| IHF Review – Richard Bourke | |

IHF REPRESENTATIVES ON OTHER BODIES

Tourism Ireland Ltd. Board

John Power
Charles Sinnott

Hotels JLC

| | |
|----------------|-----------------|
| John Power | Lee Kidney |
| Anne O'Carroll | Peter McDermott |
| Philip Gavin | William Power |

Fáilte Ireland Board

Mary McKeon
Noel O'Callaghan
Patrick O'Donoghue

Catering JLC

Donal O'Meara

Tourism Marketing Partnership

John Power

Irish Tourist Industry Confederation

Richard Bourke
John Power

Employment Appeals Tribunal

Billy O'Carroll
Peter Pierson

HOTREC

Richard Bourke
John Power

Regional Fisheries Board

Maire O'Connor (Western)
Mary O'Connor (Southern)
Betty Hayes (Eastern)

Business Tourism Forum

John Power

IBEC Dublin Executive

John Power

Dublin Convention Bureau

Niall Geoghegan
John Power
Matthew Ryan

Drinks Industry Group

Richard Bourke
John Power

BRANCH CHAIRPERSONS 2005/2006

| | |
|----------------------------|------------------|
| Cork | John Gately |
| Donegal | Paul Diver |
| Dublin | Terry McCoy |
| Galway | John Bourke |
| Kerry | Pat Chawke |
| Mayo | John Varley |
| Midlands | Neil Cummins |
| Mourne/Boyne/Lakes | Tony Walker |
| Sligo/Leitrim/N. Roscommon | Kevin McGlynn |
| South East | Peter Wilson |
| Shannon | David Fitzgerald |
| Wicklow | Lee Gregson |

Vienna Woods Hotel, Glanmire, Co. Cork.
Sand House Hotel, Rossnowlagh, Co. Donegal.
Redbank Lodge & Restaurant, Skerries, Co. Dublin.
Glenlo Abbey Hotel, Bushypark, Galway.
Aghadoe Heights Hotel, Killarney, Co. Kerry.
Atlantic Coast Hotel, The Quay, Westport, Co. Mayo.
Prince of Wales Hotel, Church Street, Athlone, Co. Westmeath.
Slieve Russell Hotel, Ballyconnell, Co. Cavan.
Sligo Southern Hotel, Strand Hill Road, Sligo.
Kilkenny River Court Hotel, The Bridge, John Street, Kilkenny.
Fitzgeralds Woodlands Hotel, Knockanes, Adare, Co. Limerick.
Glenview Hotel, Glen-O-The-Downs, Delgany, Co. Wicklow.

HONORARY BRANCH SECRETARIES 2005/2006

| | |
|----------------------------|------------------|
| Cork | Liam Lally |
| Donegal | Terry McEniff |
| Dublin | Barry O'Sullivan |
| Galway | Siobhan Maher |
| Kerry | Emer Moynihan |
| Mayo | John Raftery |
| Midlands | Brian Pierson |
| Mourne/Boyne/Lakes | Niall Quinn |
| Sligo/Leitrim/N. Roscommon | Joseph Dolan |
| South East | Paul McDaid |
| Shannon | Aileen Phelan |
| Wicklow | TBA |

Rochestown Park Hotel, Rochestown Road, Douglas, Cork.
Mount Errigal Hotel, Ballyraine, Letterkenny, Co. Donegal.
Blooms Hotel, 6 Anglesea Street, Temple Bar, Dublin 2.
Glenlo Abbey Hotel, Bushypark, Galway.
Earls Court House, Woodlawn Junction, Muckcross Road, Killarney, Co. Kerry.
Downhill Inn, Sligo Road, Ballina, Co. Mayo.
Days Hotel, Main Street, Tullamore, Co. Offaly.
Ballymascanlon House Hotel, Dundalk, Co. Louth.
Bush Hotel, Carrick-On-Shannon, Co. Leitrim.
Faithlegg House Hotel, Faithlegg, Co. Waterford.
Jurys Inn Limerick, Lower Mallow Street, Limerick.



ACTION RECRUITMENT

St. Andrews House, 28-30 Exchequer Street, Dublin 2.
Tel: 01-6778544
Fax: 01-6796830
Email: jobs@actionrecruitment.ie
Website: www.actionrecruitment.ie
Contact: Mr. Brian Fahy
Business Classification: Recruitment Specialists
Company Description:
Action Recruitment was established in 1974 and continues to lead others in standards of service and ethical business practices. The key to our success is the intensity with which we treat our candidates and clients. We specialise solely in the recruitment of hospitality professionals.

AIB BANK

Bankcentre, Ballsbridge, Dublin 4.
Tel: 01-6411577
Fax: 01-2830476
Email: thomas.t.curran@aib.ie
Contact: Mr. Tom Curran
Business Classification: Financial Institution
Company Description:
AIB Bank has a dedicated Hotels & Tourism Team. This specialist team provides a comprehensive, relationship-based service and offers a full range of tailored banking products to the Hotels and Tourism Sector.

AMERICAN EXPRESS ESTABLISHMENT SERVICES

PO Box 56, Arklow Business Park, Arklow, Co. Wicklow.
Tel: 1800-709909
Fax: 0402-25904
Email: chris.maxwell@americanexpress.ie
Contact: Mr. Chris Maxwell
Business Classification: Credit Card Services
Company Description:
Centurion Card Services operates AMERICAN EXPRESS CARDS SERVICES - Ireland and have enjoyed a mutually beneficial relationship with the Irish hotel industry for many years.

ANGLO IRISH BANK

Stephen Court, 18-21 St. Stephens Green, Dublin 2.
Tel: 01-6162000
Fax: 01-6162411
Email: enquiries@angloirishbank.ie
Website: www.angloirishbank.com
Contact: Ms. Mary Nolan
Business Classification: Financial Institution
Company Description:
A fully integrated banking group with an asset base of 22 billion and capital resources in excess of 2.2 billion. The bank's treasury division offers a comprehensive range of products, including personal and corporate deposit, corporate foreign exchange and interest rate risk management products.

ARACHAS CORPORATE BROKERS LTD.

The Courtyard, Carmanhall Road, Sandyford Industrial Estate, Dublin 18.
Tel: 01-2135000
Fax: 01-2135001
Email: Paul.Murphy@arachas.ie
Contact: Mr. Paul Murphy
Business Classification: Insurance Consultancy

AVCOM

Unit B, Three Rock Road, Sandyford Industrial Estate, Dublin 18.
Tel: 01-2957213
Fax: 01-2953783
Email: avcom@avcom.ie
Website: www.avcom.ie
Contact: Mr. Tony Murphy
Business Classification: Audio Visual Equipment
Company Description:
Avcom is the largest provider of audio visual equipment for conferences and events to the hospitality industry in Ireland. Avcom also provides specialist services and packages for Irish hotels.

BANK OF SCOTLAND, IRELAND

124-127 St. Stephens Green, Dublin 2.
Tel: 01-2674000
Fax: 01-2974390
Email: joseph.oreilly@bankofscotland.ie
Website: www.bankofscotland.ie
Contact: Mr. Joseph O'Reilly
Business Classification: Financial Institution
Company Description:
Bank of Scotland (Ireland) Ltd. Is a specialist business bank providing a focused range of products and services to the hotel industry. They have a dedicated and expert team in place who are keen to discuss your financial needs.

BEAMISH & CRAWFORD

South Main Street, Cork.
Tel: 021-4911100
Fax: 021-4911111
Email: info@beamish.ie
Website: www.beamish.ie
Contact: Mr. Fiachra Driscoll
Business Classification: Beverages
Company Description:
The Cork based brewery brews and distributes an international portfolio of brands to the Irish market including Beamish Genuine Irish Stout, Miller Genuine Draft, Foster's Lager, Kronenbourg 1664, Carling, Beamish Red Ale and Scrumpy Jack Cider.

BOOK NOW LTD.

1 Walkers Cottages, Mount Pleasant Place, Ranelagh, Dublin 6.
Tel: 01-4127600
Fax: 01-406022
Email: philiptroy@booknowlimited.com
Website: www.booknow365.com
Contact: Mr. Philip Troy
Business Classification: Hotel Reservations
Company Description:
Book Now 365 (also known as Hotel Ireland and Book Now) is a Dublin based hotel reservation service in business since 1999. Book Now 365 handles 15million worth of bookings (2005 from UK, USA, Europe and Ireland).

BUREAUSCOPE.COM

Unit 14, Abbey Business Centre, Abbey Street, Kilkenny.
Tel: 056-7790840
Fax: 056-7790840
Email: helen@caseytechnology.ie
Website: www.bureauscope.com
Contact: Mr. Conor Casey
Business Classification: Energy Management Consultants
Company Description:
We provide specialist energy management skills to supplement your in-house team in the following areas: - Awareness programmes, compliance monitoring, conservation programme development, energy aspects listing and rating, external auditing, policy development, procurement, programme review, site surveys to identify appropriate meter locations

C&C WHOLESALE LTD.

Templemore Road, Thurles, Co. Tipperary.
Tel: 0504-21022
Fax: 0504-23180
Email: ccwsales@cantrell.ie
Website: www.ccw.ie
Contact: Mr. Paddy Doody
Business Classification: Beverages
Company Description:
National distributor of all packaged goods to the hotel sector. Brand leaders include Club soft drinks/mixers, 7Up, Pepsi Cola, WKD and a complete range of packaged beers. Nine depots nationwide.

CALOR GAS

Long Mile Road, Dublin 12.
Tel: 01-4505000
Fax: 01-4506070
Email: info@calorgas.ie
Website: www.calorgas.ie
Contact: Mr. Terry Leonard
Business Classification: Gas Suppliers
Company Description:
Calor Gas, a market leader in the Liquid Petroleum Gas industry has a long association with the hotel industry going back over 60 years. We supply LPG for catering applications with nine out of ten chefs preferring to cook on gas. However, we also supply gas for heating applications, hot water, leisure centres, spa facilities, air handling systems, gas fires, hotel laundries and patio heating solutions. Calor provide a technical advice and design service for all applications.

CAVS

1 Harcourt Lane, Dublin 2.
Tel: 01-4781314
Fax: 01-4781316
Contact: Mr. Frank Quigley
Business Classification: Audio Visual Equipment

CB RICHARD ELLIS GUNNE

164 Shelbourne Road, Ballsbridge, Dublin 4.
Tel: 01-6185500
Fax: 01-6688850
Email: dermot.curtin@cbreg.ie
Website: www.cbregunne.com
Contact: Mr. Dermot Curtin
Business Classification: Commercial Real Estate
Company Description:
CB Richard Ellis Gunne are Irelands leading hotel property consultants, specialising in sales and acquisitions, valuations and strategic development advice.

CELTIC LINEN LTD.

Drinagh, Wexford.
Tel: 053-9165700
Fax: 053-9165774
Email: sales@celticgroup.ie
Website: www.celticgroup.ie
Contact: Mr. Martin Murphy
Business Classification: Linen Suppliers/Hygiene Suppliers
Company Description:
Celtic is family owned and specialises in providing solutions for the hotel industry in Ireland. Celtic is the leading supplier of bed and table linen, workwear garments, dustmat services and cabinet roller towels and also provides hotel textiles, janitorial supplies and paper to many fine hotels in Ireland.

COCA-COLA BOTTLERS IRELAND

Western Industrial Estate, Naas Road, Dublin 12.
Tel: 01-4195692
Fax: 01-4602169
Email: mo.durkan@cchbc.com
Website: www.coca-colabottlers.com
Contact: Ms. Mo Durkan
Business Classification: Beverages
Company Description:
Founded in 1952 and part of the Coca-Cola Hellenic Bottling Company since 2000, Coca-Cola Bottlers Ireland is Ireland's leading soft drinks company. Brand Names: Coca-Cola, Diet Coke, Coke with Lime, Diet Coke with Lime, Vanilla Coke, Sprite, Sprite Zero, Fanta Orange, Fanta Orange Light, Fanta Lemon, Fanta Lemon Light, Fanta Exotic, Fanta Greenz, Lilt, Diet Lilt, Schweppes, Tanora, Fruice, Deep River Rock, Vittel, Powerade, Dr Pepper, BPM, Oasis and Nestea

COURISTAN CARPETS (IRL) LTD.

Store Street, Youghal Co. Cork.
Tel: 024-93454
Fax: 024-92959 / 045-521923
Email: info@couristanyoughal.com
Contact: Mr. Michael Lenehan
Business Classification: Floor Covering Specialists
Company Description:
Couristan have been manufacturing Axminster carpet in Youghal since 1984, and are the leading supplier of Axminster to the Irish hotel industry, coloured and designed to your own specification.

COYLE HAMILTON WILLIS

7-9 South Leinster Street, Dublin 2.
Tel: 01-6616211
Fax: 01-6614369
Email: david.ohalloran@coylehamilton.com
Website: www.coylehamilton.com
Contact: Mr. David O'Halloran
Business Classification: Insurance Consultancy
Company Description:
Coyle Hamilton manages the IHF insurance facilities for members, including Innsure, the IHF pension scheme, IHF safety corner, employment practices liability and Package Holidays and Travel Trade Act Bond Facility.

**CUISINE DE FRANCE LTD.**

Belgard Square, Tallaght, Dublin 24.
 Tel: 01-4057200
 Fax: 01-4057290
 Email: info@cuisinedefrance.com
 Website: www.cuisinedefrance.com
 Contact: Ms. Emma Farrell
 Business Classification: Food Service
 Company Description:
 Cuisine De France is located in Dublin with several depots nationwide, supplying 32 counties. Its successful brand portfolio includes Cuisine de France, Pierre's, Delice de France. Recently launched to market is a new range of Swiss style pastries under the Heistand brand and a new range of artisan breads under the La Brea Bakery brand especially suitable for the hotel sector in Ireland.

DAWN FARM FOODS

The Maudlins, Naas, Co. Kildare.
 Tel: 045-875555
 Fax: 045-875046
 Email: graftery@dawnfarms.ie
 Website: www.dawnfarms.ie
 Contact: Ms. Gillian Raftery
 Business Classification: Food Service
 Company Description:
 Dawn Farm Foods, based in Naas, Co. Kildare, is a leading manufacturer of fully cooked meat products for the catering and foodservice sector in Europe. Dawn Farms has recently introduced a range of fully cooked breakfast and snacking products developed specifically for the hotel sector in Ireland

DIAGEO IRELAND

St. James Gate, Dublin 8.
 Tel: 01-4536700
 Fax: 01-4084810
 Email: dennis.markey@diageo.com
 Website: www.diageo.com
 Contact: Mr. Dennis Markey
 Business Classification: Beverages
 Company Description:
 Diageo Ireland is responsible for the production, sales, marketing and distribution of a range of premium beers, spirits and wines. Ireland is one of Diageos major markets and a significant exporter to global markets.

ECOLAB

La Valee House, Upper Dargle Road, Bray, Co. Wicklow.
 Tel: 01-2763500
 Fax: 01-2761900
 Email: infoireland@ecolab.com
 Website: www.ecolab.com
 Contact: Mr. Eamon Doherty
 Business Classification: Chemical/Detergent Hygiene
 Company Description:
 Ecolab is Ireland's leading provider of Total Hygiene Solutions to the Hotel Industry, available 24-7-365, supplying you with peace of mind when it comes to cleanliness and hygiene. We are trusted to protect some of Ireland's best known brand names, its no wonder people ask Is It Clean? Or Is It ECOLAB Clean?

EDWARD DILLON & CO. LTD.

25 Mountjoy Square, Dublin 1.
 Tel: 01-8193300
 Fax: 01-8555852
 Contact: Mr. Alan Crowley
 Business Classification: Beverages
 Company Description:
 Suppliers of premium wines and spirits to Irish hotels and restaurants. The spirit portfolio includes Hennessy Cognac, Bacardi Rumm, Bombay Sapphire Gin, Finlandia Vodka and Jack Daniels, while the wine range includes Wolf Blass (Australia), Fetzer (California), Carmen (Chile) and Nederburg (South Africa)

EIRCOM

5B Cumberland House, Fenian Street, Dublin 2.
 Tel: 01-7013706
 Fax: 01-7012943
 Email: driordan@eircom.ie
 Website: www.eircom.ie/business
 Contact: Mr. Donal Riordan
 Business Classification: Telecommunications
 Company Description:

ELECTROPLUS CABLE & SATELLITE LTD.

Unit 5, Block C, City Link Business Park, Old Naas Road, D 12.
 Tel: 01-4199253
 Fax: 01-4196245
 Email: jmaher@electroplus.ie
 Website: www.electroplus.ie
 Contact: Mr. Jane Maher
 Business Classification: TV Management Systems/Internet Access
 Company Description:
 Electroplus provide an extensive range of interactive solutions of the hospitality sector to include Interactive TV, Pay TV, Comprehensive Internet Solutions, Hotel TV and LCD TV

ENERGIA

Mill House, Ashtown Gate, Navan Road, Dublin 15.
 Tel: 01-8692000
 Fax: 01-8692050
 Email: michael.nugent@energia.ie
 Website: www.energia.ie
 Contact: Mr. Michael Nugent
 Business Classification: Energy Supply
 Company Description:
 Energia was formed in 1999 as the retail arm of The Viridian Group PLC. As Irelands largest independent energy supplier Energia are already delivering on the opportunities presented by market liberalisation. Energia have partnered with the Irish Hotels Federation in offering significant electricity cost savings to its members.

ESB CUSTOMER SUPPLY

The Basin, Tralee, Co. Kerry.
 Tel: 066-7145721
 Fax: 066-7125466
 Email: breda.walsh@esb.ie
 Website: www.esb.ie
 Contact: Ms. Breda Walsh
 Business Classification: Energy Supply
 Company Description:
 ESB Customer Supply delivers services to customers including billing of accounts, receipting payments and providing advice on energy efficiency and tariff rates.

EUROCONEX TECHNOLOGIES LTD.

2nd Floor, Building E, Cherrywood Science & Technology Park,
Loughlinstown, Co. Dublin.

Tel: 01-2390241

Email: Stephen.McDonagh@euroconex.com

Website: www.euroconex.com

Contact: Mr. Steven McDonagh

Business Classification: Financial

Company Description:

EuroConex Technologies Ltd. Is Bank of Ireland's card processing specialist in Ireland. EuroConex delivers tailored card acceptance solutions to the hotel industry, including currency conversion on both terminals and Micros Fidelio.

FEXCO

12 Ely Place, Dublin 2.

Tel: 01-6373000

Fax: 01-6620788

Email: ahennessy@fexco.com

Website: www.fexco.com

Contact: Ms. Alison Hennessy

Business Classification: Financial

Company Description:

The FEXCO Group powers global payments through market leading partnerships, innovative use of information technology and a supreme delivery of customer service. Through our three core product groups, Global Corporate Payments, Global Consumer Payments and Business Processing, we distribute millions of international payment transactions annually.

FINDLATER WINE MERCHANTS LTD.

Kilcarbery Park, Nangor Road, Clondalkin, Dublin 22.

Tel: 01-6304106

Fax: 01-6305006

Website: www.findlatergrants.ie

Contact: Mr. Barry Geoghegan

Business Classification: Beverages

Company Description:

An enviable portfolio includes: Wine: Lindemans, Rosemount, Penfolds, Wynns, Cape Mentelle, Coldstream Hills, Cloudy Bay, Esk Valley, Montana, Arniston Bay, Villiera, Neil, Ellis, Paul Cluver, Concha y Toro, Villa Montes, Cono Sur, Kendall Jackson, Frogs Leap, Closdu Bois, Sutter Home, Trivento, Bend in the River, Goldener Oktober, Royal Tokaji, Chateau Musar, Antinori, Masi, Badia a Coltibuono, Rocca Grimaldi, Villa di Vetrice, Salice Salentino, Tormaresca, Prunotto, Boscaini, Monevino; Champagne: Veuve Clicquot, Perrier Jouet, Mumm, Krug; Sparkling Wine: Codorniu, Lindauer, Pelorus, Seaview, Prosecco, Asti Mondoro

FIRST RATE BUREAU DE CHANGE

4 Customs House Plaza, IFSC, Dublin 1.

Tel: 01-6116700

Fax: 01-6116781

Email: paul_j.healy@boimail.com

Contact: Mr. Paul Healy

Business Classification: Financial

Company Description:

Bank of Ireland's First Rate has been providing Bureau de Change and related services to the Hotel and Guesthouse sector since 1991. Its networks comprises 1,000 outlets including many of Ireland's leading hotels.

FLOGAS IRELAND LTD.

Dublin Road, Drogheda, Co. Louth.

Tel: 041-9831041

Fax: 041-9834652

Email: info@flogas.ie

Website: www.flogas.ie

Contact: Mr. Eoin O'Flynn

Business Classification: Gas Suppliers

Company Description:

Flogas was incorporated in 1977 and is a leading supplier of LP Gas (Liquefied Petroleum Gas) to the catering industry. Gas applications including cooking, heating, water heating, coal effect fires, Outdoor Heating Solutions, Patio Heaters and tumble dryers. Flogas offer customers a comprehensive and free technical advisory service covering all aspects of gas installations including planning, design, installation and on-going maintenance.

GRAM

44 The Tides, Portavogie, BT22 1SE, N. Ireland.

Tel: 048-4277-2821

Fax: 048-4277-2823

Email: warren_180@hotmail.com

Website: www.gram.co.uk

Contact: Mr. Warren Giffen

Business Classification: Refrigeration

Company Description:

Gram manufactures refrigerators for professional use. With a vast product range including upright refrigerators and freezers, counters, coldrooms and blast chillers.

GVA DONAL O'BUACHALLA

86 Merrion Square, Dublin 2.

Tel: 01-6762711

Fax: 01-6611766

Contact: Mr. Desmond Killen

Business Classification: Commercial Real Estate

Company Description:

Property and Rating Consultants, Estate Agents and Auctioneers. Provide comprehensive property advice in the following areas: rateable valuation, assessments, including appeals, asset valuations, estate agency, compulsory purchase, etc.

HEINEKEN IRELAND LTD.

Murphy Brewery, Leitrim Street, Cork.

Tel: 021-4503371

Fax: 021-4503011

Email: declan.farmer@heineken.ie

Contact: Mr. Declan Farmer

Business Classification: Beverages

Company Description:

Heineken Ireland is one of the leading suppliers of premium beers to the Irish Licensed Trade with a unique blue chip brand portfolio, which includes Heineken-Ireland's number one selling lager, Murphy's Irish stout, Coors Light and the successful Amstel brand.



HORWATH BASTOW CHARLETON

Marine House, Clanwilliam Court, Lower Mount Street, Dublin 2.
Tel: 01-6760951
Fax: 01-6625105
Email: justin.baily@horbc.ie
Website: www.hbc.ie
Contact: Mr. Justin Baily
Business Classification: Financial Advisors
Company Description:
A leading firm of advisors to the hotel and leisure industry. Its services include feasibility and viability reports, project finance, refinancing existing operations, as well as accounting management control and auditing.

HOTELKEEPER.IE

Lismore, Main Street, Blanchardstown, Dublin 15.
Tel: 01-8209904
Fax: 01-6335955
Email: info@hotelkeeper.com
Website: www.hotelkeeper.com
Contact: Ms. Susie Glynn
Business Classification: Recruitment Specialists
Company Description:
Hfocus.com represents a refreshingly, novel and innovative approach to networking the hospitality industry. Complimented by its professional interface and valuable content, Hfocus.com is a complete resource and effective recruitment tool.

HUGH JORDAN & CO. LTD.

Grand Canal Quay, Dublin 2.
Tel: 01-6779498
Fax: 01-6715803
Email: john.whyte@hughjordan.com
Website: www.hughjordan.com
Contact: Mr. John Whyte
Business Classification: Hospitality Products Specialists
Company Description:
Hugh Jordan & Co., Ireland's largest supplies distributor was established in 1949 and offers unrivalled service by stocking products in-depth and supporting local manufacturers where compatible. Products include bar and restaurant furniture, tableware, servingware and kitchenware.

INSPIRIT IRELAND

47 Adelaide Road, Dublin 2.
Tel: 01-6768100
Fax: 01-6768101
Email: nbrowne@precor.co.uk
Website: www.precor.com
Contact: Mr. Niall Browne
Business Classification: Fitness Equipment Suppliers
Company Description:
Inspirit are specialists in the Irish hotel leisure industry. Quality bespoke services include: design & build, provision of fitness equipment, staff development, membership pre-sales, operational systems, marketing & management. Healthy in mind, in body and in business.

INTERFACE IRELAND

2nd Floor, Bridgewater Business Centre, Bridgewater Quay, Islandbridge, Dublin 8.
Tel: 01-6798466
Fax: 01-6798481
Email: maria.tarpey@eu.interfaceinc.com
Contact: Ms. Maria Tarpey
Business Classification: Floor Covering Specialists

IRISH DISTILLERS WINES & SPIRITS LTD.

Bow Street Distillery, Smithfield, Dublin 7.
Tel: 01-8725566
Fax: 01-8723109
Email: jcummins@idl.ie
Website: www.jameson.ie / www.pernod-ricard.com
Contact: Mr. Jim Cummins
Business Classification: Beverages
Company Description:
Ireland's leading Wines & Spirits Company. Brands include Powers Gold Label, Paddy, & Jameson Irish Whiskey, Cork Dry Gin, Huzzar & Wyborowa Vodka, Martell Cognac, Havana Club Rum, Malibu, Kahlua, Tia Maria, Chivas Regal, Jacobs Creek & Gallo range of wines.

IRISH MUSIC RIGHTS ORGANISATION

Copyright House, Pembroke Row, Lower Baggot Street, Dublin 2.
Tel: 01-6614844
Fax: 01-6763125
Email: info@imro.ie
Website: www.imro.ie
Contact: Mr. Patrick Kelly
Business Classification: Music
Company Description:
Without the Irish Music Rights Organisation anyone wishing to use copyright music in public would need permission from each individual copyright owner for each individual music piece. Through IMRO's arrangements with similar organisations worldwide it is estimated that IMRO represents the interests of in excess of 750,000 songwriters and composers and administers in excess of 14.25 million songs. The cost of an IMRO licence is dependant on the type of premises being licensed and the extent of music usage. IMRO have agreed tariffs with the Irish Hotels Federation.

JLA LTD.

River Lodge, Lucan, Co. Dublin.
Tel: 01-6010525
Fax: 01-6281937
Email: info@jla.com
Website: www.jla.com
Contact: Mr. Tony Kerr
Business Classification: Commercial Laundry Equipment
Company Description:
Major commercial laundry equipment distributor, JLA, has more than 30 years experience of the hospitality sector and offers hotels of all sizes the finest machines, tailor-made laundry solutions and fast and efficient service

JOBS.IE

33-35 Wicklow Street, Dublin 2.
Tel: 01-6703891
Fax: 01-6335984
Email: samantha@jobs.ie
Website: www.jobs.ie
Contact: Ms. Samantha Hickey
Business Classification: Recruitment Specialists

JOHN E. COYLE FURNITURE

Plantation, Monaghan.

Tel: 047-82155

Fax: 047-84164

Email: killian@johnecoyle.ie

Website: www.coylefurniture.com

Contact: Mr. Killian Coyle

Business Classification: Furniture

Company Description:

Established in 1936 and one of Irelands leading furniture manufacturer manufacturers, John E. Coyle contract caters for customer requirements in the hotel and tourism sector. Choose from existing ranges or design your own bedroom furniture - new build or refurbishment projects

KONE IRELAND LTD.

Unit G7, Calmount Park, Calmount Avenue, Ballymount, Dublin 12.

Tel: 01-4296200

Fax: 01-4296292

Email: john.jordan@kone.com

Website: www.kone.com

Contact: Mr. John Jordan

Business Classification: Lifts

Company Description:

Elevatore and Escalator installation, maintenance, repair and upgrading with full nationwide coverage, KONE provides a proactive and professional service, focussing on innovative solutions to meet the customers needs.

MARIA LOGAN RECRUITMENT

29-30 Dame Street, Dublin 2.

Tel: 01-6774680

Email: info@marialogan.com

Website: www.marialogan.com

Contact: Ms. Maria Logan

Business Classification: Recruitment Specialists

Company Description:

Maria Logan has a background of almost 20 years achievement in specialist hotel & catering recruitment and placement. Focused and results oriented, Maria Logan Recruitment brings a unique mix of experience and insight to the evolving needs of today's market.

MICROS FIDELIO

Premier Business Centre, 3013 Lake Drive, Citywest Business Campus, Dublin 24

Tel: 01-4693718

Fax: 01-4693115

Email: rmcardle@micros.com

Website: www.micros.com

Contact: Ms. Rosemary McArdle

Business Classification: Computer Management Systems

Company Description:

Micros Fidelio, the worlds leading developed of enterprise applications serving the hospitality industry. Fidelio/Opera is a fully integrated suite of products ranging in installation size in Ireland from 17 to 750 bedrooms. Micros EPOS combines POS, Inventory Management and Corporate Applications.

NATIONAL LINEN

Unit F, Fonthill Industrial Park, Clondalkin, Dublin 22.

Tel: 01-4600321

Fax: 01-4600328

Email: sales@national-linen.ie

Website: national-linen.ie

Contact: Mr. Denis O'Callaghan

Business Classification: Linen Suppliers

Company Description:

National Linen are specialists in the supply of premium quality linen to the hotel and restaurant sector. Products include bedroom linen & towelling, table linen, chefs wear, kitchen cloths, dustmats, logo mats & washroom supplies. Connacht Court is a member of the National Linen Group.

NOEL RECRUITMENT

St. John's House, High Street, Tallaght Village, Dublin 24.

Tel: 01-4610740

Fax: 01-4610870

Email: mstaunton@noel.ie

Website: www.noelrecruit.ie

Contact: Ms. Mark Staunton

Business Classification: Recruitment Specialists

Company Description:

Noel Recruitment consists of 60 staff, 4 offices throughout Dublin, 1 in Cork and 1 in Waterford, recruiting both permanent and temporary staff in hotel and catering, sales and marketing, office and secretarial and industrial and legal sectors.

ORMONDE TECHNOLOGIES LTD.

1 Oak Road, Dukes Meadow, Kilkenny.

Tel: 086-2208008

Fax: 056-7760699

Email: info@surfbox.ie

Website: www.surfbox.ie

Contact: Mr. Thomas Marry

Business Classification: Company Description:

With your SurfBox Coin Operated Internet Terminal, you can now provide your customers with 'pay as you go' internet access. It will generate additional revenue while providing a useful service to your customers. SurfBox is supplied as a totally managed solution with zero up-front or operating costs to you.

PARAGON BUSINESS SYSTEMS

Commercial House, Dublin Road, Kilkenny.

Tel: 056-7752400

Fax: 056-65849

Email: info@paragonsystems.ie

Website: www.paragonsystems.ie

Contact: Mr. Anselm Molloy

Business Classification: Computer Management Systems

Company Description:

Paragon Business Systems provide integrated technology solutions for Reservations Billing, Conferencing, Bar & Restaurant, Leisure Membership, Customer Loyalty and e-commerce, ensuring complete management control.



PEGASUS SOLUTIONS

2 Kew Bridge Road, Brentford, TW8 0JF, England.
Tel: 0044-208-4905870
Fax: 0044-208-9943139
Email: catt.campbell@pegs.com
Website: www.pegs.com
Contact: Ms. Catt Campbell
Business Classification: Hotel Reservations
Company Description:
Pegasus Solutions is a worldwide leader in hotel reservations-related technology and services. These include GDS Representation through Utell by Pegasus and Unirez by Pegasus, Tour Operator connection through PegsTour and multiple internet services.

PSL CONSULTING/VIVAS HEALTH

Suite 30, The Mall, Beacon Court, Sandyford, Dublin 18.
Tel: 01-2934980
Fax: 01-2934977
Email: skeane@pslconsulting.ie
Website: www.pslconsulting.ie
Contact: Ms. Adrienne Murphy
Business Classification: Healthcare
Company Description:
PSL Consulting is a wholly owned Irish company, with a wealth of experience in determining and administering the health, investment, life assurance and wealth management needs of our clients. PSL have been working with VIVAS Health (Ireland's newest health insurer) for the past 16 months. Our involvement with VIVAS Health positions us as one of the few consulting houses to offer independent advice and tailored health care solutions exclusively to IHF members.

QUADRIGA WORLDWIDE LTD.

Forum One, Station Road, Theale, Berkshire, RG7 4RA, UK.
Tel: 0044-118-9033926
Fax: 0044-118-9033970
Email: john.shaw@uk.quadriga-ww.com
Contact: Mr. John Shaw
Business Classification: TV Management Systems
Company Description:
Quadriga UK, formerly Thorn Business Communications, supplies guest room technology ranging from standard TVs and pay movie solutions to a totally interactive system offering welcome message, wake up, minibar integration, etc.

RAFFERTY HOSPITALITY PRODUCTS

1 Shepherds Drive, Carnbane Industrial Estate, Newry, Co. Down, BT35 6QJ, N. Ireland.
Tel: 048-3025-2205
Fax: 048-3025-2206
Contact: Mr. Jim Rafferty
Business Classification: Hospitality Products Specialists
Company Description:
Printers and suppliers of the full range of personalised products to the hotel, restaurant and hospitality industry.

RENAISSANCE PRODUCTS

Renaissance House, Church Street, Howth, Co. Dublin.
Tel: 01-8321412
Contact: Ms. Rosemary Evans
Business Classification: Spa Consultancy
Company Description:
Renaissance Products, established in 1991, specialised in servicing the Health Spa and Destination/Hotel Spa market in Ireland. The company's impressive portfolio of products includes two exclusive pampering ranges: Yon Ka Paris, an Aromatherapy spa range and Uspa, a botanical Spa range from Australia. Their full spa package is completed with Vered Cosmetics, a US make-up range, waxing systems and spa equipment.

RENTOKIL INITIAL LTD.

47 Terenure Road East, Dublin 6.
Tel: 01-4902788 / 01-4196105
Fax: 01-4905732
Email: momahoney@rentokil.ie
Contact: Mr. Michael O'Mahoney
Business Classification: Pest Control/Hygiene Systems
Company Description:
Operating in over 40 countries, Rentokil's services are committed to improving the environment and protecting health and property. Rentokil Initial is a major provider of hygiene services, personal services, security services and transport services.

RETAIL SYSTEMS TECHNOLOGY LTD.

Campsie Real Estate, McLean Road, Eglinton, Co. Derry. BT47 3XX, N. Ireland.
Tel: 048-7186-0069
Fax: 048-7186-0517 Kathleen
Email: sales@rstepos.com
Website: www.rstepos.com
Contact: Mr. Brendan Jordan
Business Classification: Computer Management Systems
Company Description:
Retail Systems Technology is a supplier of Point of Sale, Hospitality and Retail Solutions. I-Touch POS is a flexible and adaptable system while Protel PMS can meet the requirements of any size hotel. With seamless integration between our products, we can offer a complete solution to our customers.

RICHARDSON INSURANCES LTD.

Suite 3, The Mall, Beacon Court, Bracken Road, Sandyford, D 18.
Tel: 01-2834155
Fax: 01-2834513
Email: joe@ril.ie
Website: www.ril.ie
Contact: Mr. Joe O'Rourke
Business Classification: Insurance Consultancy
Company Description:
For almost 40 years, Richardson Insurances Limited, has specialised in tailoring insurance packages for niche markets. Insurance costs have been a major expense to the hotel industry in recent years, and while the introduction of the smoking ban and new liquor licensing laws have all contributed to lower turnover, the cost of running a hotel business has not reduced! Recognising this, Richard Insurances Ltd. recently introduced the following benefits: reduced rates by up to 50% in some cases, further reductions by introducing no claim bonus, easy payment plan and a three year premium deal.

RICHMOND RECRUITMENT

Merchants House, Merchants Quay, Dublin 8.
Tel: 01-6796266
Fax: 01-6796442
Email: pnorton@richmond.ie
Website: www.richmond.ie
Contact: Ms. Paula Norton
Business Classification: Recruitment Specialists
Company Description:
Richmond Recruitment are Ireland's largest privately owned recruitment agency employing over 50 staff in four branches nationwide. The company has a proven track record of providing quality recruitment and selection services for the hotel and catering industry. Richmond Recruitment was established in 1990 and has continued to grow and expand since then. The Licensed Vintners Association has reached an agreement with Richmond Recruitment to provide a recruitment service to all their members.

RUSSELL WILL LTD.

Unit 5, Baldoyle Industrial Estate, Grange Road, Baldoyle, Dublin 13.
Tel: 01-8063750
Fax: 01-8322335
Email: orders@russellwill.ie
Contact: Mr. David Will
Business Classification: Hospitality Products Specialists
Company Description:
Distributor of catering disposables, tableware products, washroom/cleaning products, custom print products to the catering industry in Ireland.

SHANNON SHOWCASE

Station Road, Ennis, Co. Clare.
Tel: 065-6865351
Fax: 065-6865250
Email: info@shannonshowcase.com
Website: www.shannonshowcase.com
Contact: Ms. Mary Spillane
Business Classification: Marketing Consultants
Company Description:
Based in Ennis, with a 150 seater call centre, Shannon Showcase pioneered Relationship Marketing in Europe with the "Getaway Breaks" promotion. This concept, linking the retail and hotel business, generated €92 million to the Irish hotel industry.

SHOP EQUIPMENT LTD.

Unit 4052, Kingswood Drive, City West Business Complex, D 24.
Tel: 01-4035300
Fax: 01-4035351
Email: kbarry@shopequipmentltd.ie
Contact: Mr. Kevin Barry
Business Classification: Computer Management Systems
Company Description:
Distributor for Micros Touchscreen Point of Sale, management and stock control systems for hotels, restaurants and bars. Premier spa salon management and club/membership management system.

SOFTBRANDS HOSPITALITY

84 Riasc Na Rí, Bothair Stiofain, Galway.
Tel: 086-6862569
Email: Linda.Blanchfield@softbrands.com
Website: www.softbrands.com
Contact: Ms. Linda Blanchfield
Business Classification: Computer Management Systems
Company Description:
SoftBrands Hospitality, Inc. is the leading hospitality software supplier in Ireland and is one of the largest suppliers of hospitality software systems in the world. We present a unique combination of expertise in hospitality and information technology. SoftBrands Hospitality products include: - PORTfolio Front Desk System, PORTfolio Central Reservations System, PORTfolio Electronic Point of Sale System.

SPRING GROVE SERVICES

Pottery Road, Dun Laoghaire, Co. Dublin.
Tel: 01-6362900 / 01-6362942
Fax: 01-6362999
Email: sales@springgrove.ie
Website: www.springgrove.ie
Contact: Ms. Aine Doyle
Business Classification: Linen Suppliers
Company Description:
Spring Grove is the largest and most successful linen service company in Ireland, trading for over 90 years. The company has recently invested in a new state of the art facility in Dun Laoghaire and is upgrading its existing plant in Cork. Spring Grove offers a range of linen that meets the high standards of today's competitive market and has built a reputation based on excellence in customer service.

STAR PRODUCTS INTERNATIONAL

Unit 6, Longmile Business Park, Naas Road, Dublin 12.
Tel: 01-4605055
Fax: 01-4605052
Email: catherine@spi.ie
Website: www.spi.ie
Contact: Ms. Catherine Harrington
Business Classification: Spa Consultancy
Company Description:
Star Products International offer award winning products and treatments and a complete Spa Management Consultancy service. We provide expertise to create, assist, operate and market your spa. Based here in Ireland we are an Irish company with over 16 years experience in the business. We offer a guiding hand as you enter the complex world of spas. A personal service is assured.

THE FIRM, CATERING RECRUITMENT SPECIALISTS

23 Earlsfort Terrace, Dublin 2.
Tel: 01-4752903
Fax: 01-4752906
Email: thefirm@indigo.ie
Website: www.thefirm.ie
Contact: Mr. Kieran Moore
Business Classification: Recruitment Specialists
Company Description:
Ireland's leading senior catering and hotel recruitment specialists, providing HR and recruitment solutions for General Management, Assistant Management, Heads of Department and Head and Sous Chefs. For confidential advice, contact Micheline Corr or Kieran Moore.



THOMAS MCLAUGHLIN LTD.

Slaney Close, Glasnevin Industrial Estate, Dublin 9.
Tel: 01-8306555
Fax: 01-8306556
Email: info@tmclaughlin.com
Contact: Mr. Alastair McLaughlin
Business Classification: Hospitality Products Specialists
Company Description:
Thomas McLaughlin Ltd., established in 1874, is a subsidiary of Bunzl Outsourcing Services - Europe's fastest growing specialist distribution group. McLaughlin's are unique in being able to provide a one-stop-shop for customers in a number of market sectors. Our range includes hotel and restaurant equipment, hotelware, glassware, cutlery, guest amenities, and a complete range of catering and washroom disposables. Our free 300 page priced catalogue is available on request.

TILESTYLE

89-90 North Wall Quay, Dublin 1.
Tel: 01-8555200
Fax: 01-8557471
Email: contracts@tilestyle.ie
Website: www.tilestyle.ie
Contact: Ms. Mary Hennessy
Business Classification: Tile Suppliers
Company Description:
TileStyle is Ireland's leading supplier of ceramic tiles and natural stone for the hospitality industry. With exclusive product ranges from all over the world, including marble, slate, limestone, glass, metal, mosaics and Victorian style tiles, TileStyle has products to suit traditional and contemporary hotel lobbies, restaurants, bars, nightclubs, bathrooms, conservatories, swimming pools and garden areas.

VDA IRELAND

Stonewell House, Cloghanover, Headford, Co. Galway.
Tel: 093-36691
Email: vda@eircom.net
Website: www.vdavda.com
Contact: Mr. Warren Edwards
Business Classification: TV Management Systems
Company Description:
In order to support the overwhelming demand for VDA's Power TV Interactive Service, VDA have a well established permanent operational base in Ireland. The Power TV platform provides movie, internet and a range of other services for hotel guests using technology of the future. Our Irish office provides sales, installation and maintenance, to support VDA's installation base.

VHI HEALTHCARE

VHI House, Lower Abbey Street, Dublin 1.
Tel: 1850-444444
Fax: 01-8745063
Email: info@vhi.ie
Website: www.vhihealthcare.com
Contact: Mr. Michael Broderick
Business Classification: Healthcare
Company Description:
VHI Healthcare insurance provides a cost-effective way for employers to attract and retain staff and helps to contribute to employee well-being and productivity.

VINGCARD

Unit 6D, KCR Industrial Estate, Ravensdale Road, Kimmage, Dublin 12.
Tel: 01-4991000
Fax: 01-4991800
Email: allena@iol.ie
Contact: Ms. Anne Allen
Business Classification: Electronic Key Card Systems
Company Description:
VingCard are the world leaders in mechanical and electronic card locking systems and room energy controllers, along with a range of door accessories specifically for the guest room industry.

South East Branch Survey

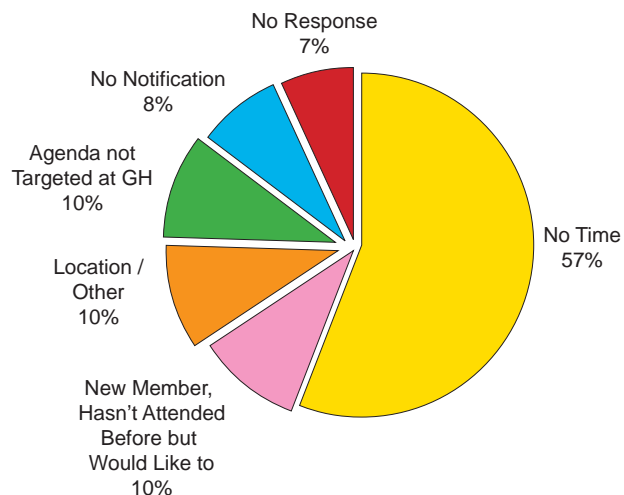
Background to the Questionnaire

- In November 2005, the Irish Hotels Federation conducted a survey of its hotel and guesthouse members within the South East Branch (Carlow, Kilkenny, Tipperary South Wexford and Waterford)
- The objective was to provide IHF members in the South East region with an opportunity to express their attitude/opinions towards local branch meetings and the IHF in general
- The survey was set out as follows:
 - General Information of the hotel or guesthouse
 - Meeting Details
 - Agenda at the Meetings
 - Other Issues
 - Additional Comments

General Information

- Of the total 120 members in the branch, 89 hotels and/or guesthouses participated in this survey, generating a 74% response rate
- Of these hotels/guesthouses 27% are in Wexford, 9% in Carlow, 12% in Tipperary South, 19% in Kilkenny and 33% in Waterford
- 56 hotels and 33 guesthouses in the area participated in the survey. 35% of the hotels and/or guesthouses had 10-25 rooms and 42% were 3 star

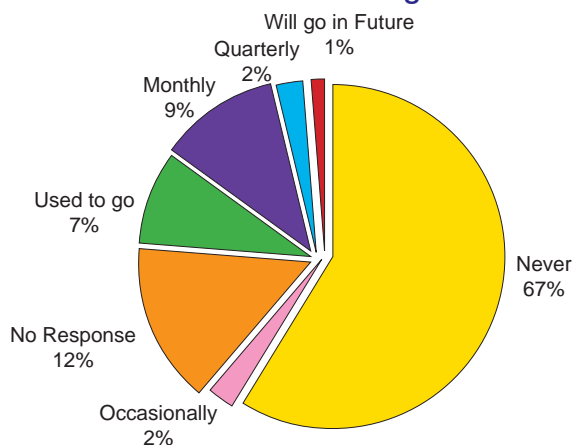
Reasons for Non-Attendance at Branch Meetings



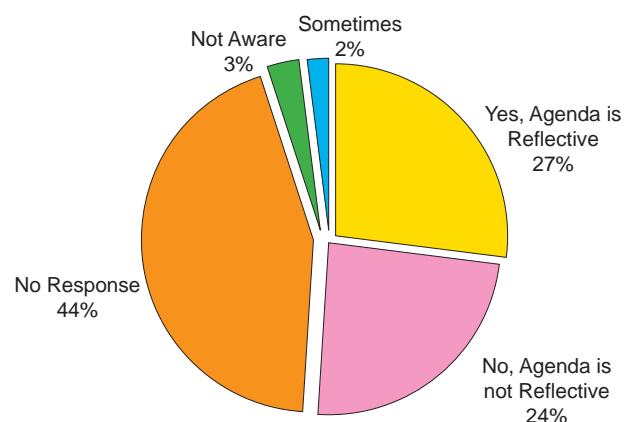
Meeting Details

- 21% of proprietors stated that they would consider sending another representative from the property. 32% stated they would not
- 58% respondents stated that they receive notification
- 50% felt they were receiving enough notice of meetings. The majority of respondents, 78%, felt that a fortnight was sufficient notice
- 52% of respondents felt that monthly meetings were the best option. 39% felt that it was only fair to have the branch meeting rotated around the branch

Attendance at Branch Meetings



Satisfaction with Branch Meeting Agenda



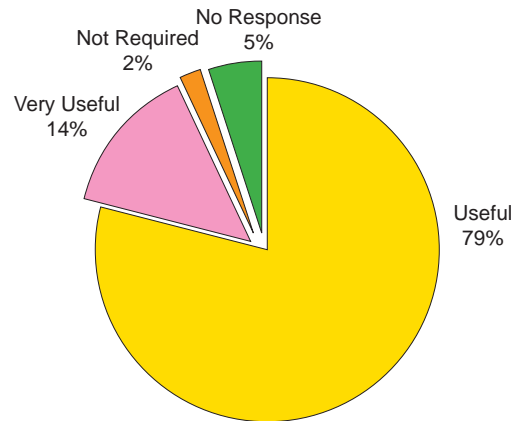


Other Agenda Items

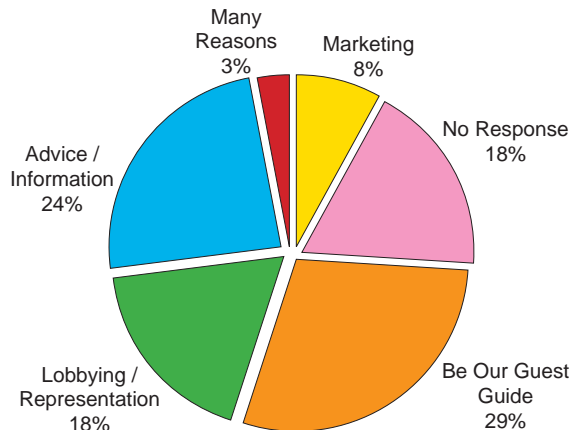
Of the 24% that did not feel that the current agenda was reflective, items suggested to better suit their business included:

- One or two meetings (perhaps alternate) being solely dedicated to guesthouse meetings
- VAT reduction, Local Authority rates and business rates for waste
- Lobbying political issues and operational issues

Usefulness of Council Meeting Summary



Reasons for Joining the IHF



Frustrating Issues

- VAT and Local Authority rates
- New hotels being built and Tax Incentives
- Branch meeting not being rotated evenly
- Labour costs / JLC rates / Minimum wage
- The late commencement of branch meetings
- Capital allowances being disrespectful to the industry

Other Reasons for Becoming an IHF Member

These included:

- Needing the support of the IHF, or knowing the body is there in times of difficulty
- Good networking opportunities to be availed of by becoming a member
- A platform for the discussion for topical issues
- The IHF influence at a political level
- Useful information from Head Office

[illegible][illegible]