

EU.EM.NET Project W.P 2

Synthesis Report

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Introduction

This document is the Synthesis report of the Analysis of the state of play in the T&H sector for the countries involved in the EU.EM.NET project.

This is only a global overview, resuming the analysis conducted in the project. The detailed information is available in the countries reports and the Best practices report, which are bases of this consolidated Synthesis report. The idea here is to put forward the main common points and differences between the 9 investigated countries.

Main characteristics of the sector in the partner's countries

Main actors

In each country, main actors of the T&H sector can be divided into 4 main categories:

- Public bodies
- Chambers
- Educational actors
- Associations (professional/ private)

Country	Public bodies	Chambers	Educational actors	Associations
Austria	<ul style="list-style-type: none"> - Parliament committee for Tourism - Federal Ministry of Economy, Family and Youth: Department for Tourism and Historical Objects - Governments of the Nine "Länder" (Provinces) administrations - Organisations founded by 	<ul style="list-style-type: none"> - Austrian Federal Economic Chamber (Employer association, membership compulsory for all Austrian enterprises) - Austrian Federal Chamber of Labour - Austrian Association of Labour Unions 	<ul style="list-style-type: none"> - VET Schools - Universities of Applied Sciences - Universities 	<ul style="list-style-type: none"> - Association of Austrian Hoteliers - Association of Austrian travel agencies and tour operators - Others (e.g. regional associations, association of certain types of employers in the tourism sector e.g. Association of Aerial passenger line companies etc.)

	<p>government to foster tourism:</p> <ul style="list-style-type: none"> ○ Austrian National Tourist Office (ANTO) ○ Austrian Hotel and Tourism Bank ○ Austrian Economic Service (Austria Wirtschaftsservice) 			
Bulgaria	<ul style="list-style-type: none"> - State Agency for Tourism at the Ministry of Economy, Energy and Tourism; 	<ul style="list-style-type: none"> - Bulgarian Tourist Chamber; - Regional Tourist Chamber: Varna, Burgas, Plovdiv, Pleven. 	<ul style="list-style-type: none"> - Tourism Colleges; - Vocational Schools of Tourism; - Training centres for quality of employment in tourism. 	<ul style="list-style-type: none"> - Bulgarian Hotel and Restaurant Association - Association of private hotels and restaurants - Bulgarian Association for Rural and Ecological Tourism - Bulgarian Association for Alternative Tourism - Association of Bulgarian Tour Operators - Association of Schools of hotels and restaurants - Union of Owners "Sunny Beach" - Travel Agencies
Croatia	<ul style="list-style-type: none"> - Ministry of tourism, Parliamentary Committee of tourism - Croatian Employers' Association - Trade Unions (STUH and SIK) 	<ul style="list-style-type: none"> - HGK – Croatian Chamber of Economy – Tourism department - HOK – Croatian Chamber of Trades and Crafts 	<ul style="list-style-type: none"> - Private colleges, business schools and faculties - Faculty of Tourism and Hospitality Management 	<ul style="list-style-type: none"> - UHPA – Association of Croatian Travel Agencies - UPUHH – Association of Employers in the Croatian Hotel industry - OMH – Association of Family and small Hotels - Croatian camping Union

				<ul style="list-style-type: none"> - Development agencies like Istrian Tourism Agency - Various other associations by profession (bartenders, waiters, etc...)
UK	<ul style="list-style-type: none"> - People1st – Sector Skills Council - Department for Culture, Media and Sport (responsible for tourism & hospitality) 	Hospitality Guild	<ul style="list-style-type: none"> - Universities - Colleges 	<ul style="list-style-type: none"> - The Confederation of Tourism and Hospitality (CTH) - The Hotel and Catering International Management Association (offers only global professional hospitality qualification) - The Association of British Travel Agents - The Institute of Travel and Tourism - The Tourism Society - The British Hospitality Association.
Luxembourg	<ul style="list-style-type: none"> - Ministère des classes moyennes et du tourisme (department tourisme). (Toursimministry) 	<ul style="list-style-type: none"> - Chamber of commerce 		<ul style="list-style-type: none"> - ONT (National Tourism Board) - ORT (Regional Tourism Board) - HORESCA : Hotels, bars and restaurants associations - EUROTOQUES and VATEL: Chef's association - GAVL : Travel agencies
Macedonia		<ul style="list-style-type: none"> - Chamber of Commerce of Macedonia - Chamber of Tourism and hospitality - Economic Chamber of Macedonia for Tourism 		<ul style="list-style-type: none"> - HOTAM (hotels association) - ATAM (tourist agencies: issues related to incentives, tourism promotion...) - Organization of Employers of Macedonia-Association of Hotels

				and tourist agencies: issues related to branch collective agreement
Romania	- Regional development agencies	- Chamber of Commerce		- Tourism and Hospitality Professional associations
Slovakia	<ul style="list-style-type: none"> - National level: Ministry of Transport, Construction and Regional development of the Slovak Republic - Section Tourism; Slovak Tourist Board (responsible for marketing and state promotion) - Local level : Eight self-governing bodies at regional level, Self-governing regions and associations of towns and villages (4 regional tourism organisations and 34 local tourism organisations) 		<ul style="list-style-type: none"> - 120 VET schools - 6 HEIs 	<ul style="list-style-type: none"> - Slovak tourism association (Zväzcestovnéhoruchu, www.zcrsr.sk): employers association - Association of commerce and tourism of the Slovak republic (Zväzobchodu a cestovnéhoruchuSlovenskejrepu bliky, www.biznis.sk) - Association of sommeliers of the Slovak republic (www.assr.sk) - Slovak association of cooks and confectioners (www.sakc.eu) - Slovak association of camping and caravanning (www.caravanning.sk) - Slovak cycloclub(www.cykloklub.sk)
Turkey	<ul style="list-style-type: none"> - Ministries (Ministry of Foreign Affairs, Ministry of Culture and Tourism, Department of Transportation etc.) - provincial bodies (23 development agencies) - Municipalities (2950) 	- Chambers of Trades and Industries (Istanbul Chamber of Industry, Istanbul Chamber of Commerce)	- Universities, all types of schools (49 vocational T&H schools 2 Universities)	<ul style="list-style-type: none"> - Confederations: Turkish Confederation of Employer Associations, Confederation of Turkish Trade Unions - Federations: Turkish Hoteliers Federation, Cooks and Chefs Federation of Turkey, Federation of the Catering Industry

				<p>Employers in Turkey</p> <ul style="list-style-type: none">- Associations: Touristic Hotels & Investors Association- Unions (Union of Hotel, Restaurant and Entertainment Facility Workers of Turkey)- Private Companies: Travel Agencies (6924), Hotels, Motels, Catering Companies, etc.
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Main figures

Country	General information	Hotels, restaurants and others in brief
Austria		59 200 Accommodations 21 400 Restaurants 4 200 Bars
Bulgaria	131 180 employees	
Croatia	90 000 employees : 6,4% of total employment in Croatia 3341 Business units engaged in hotel and restaurant activity 13 763 BU of tradesmen	2190 Hotels and restaurants 402 Hotels 500 camping sites 16 Youth hotels 340 other provision of lodging for tourists 790 bars
UK	2 046 000 employees, 7% of total employment	139 200 individual hospitality, leisure, travel and tourism business enterprise: - 33% restaurants - 18% hospitality services - 16 % bars
Luxembourg	14 000 employees, 6,3% of total employment	80 hotels 100 camping sites 40 cottages 980 bars 960 restaurants
Macedonia		200 hotels 6 spa centres 715 bars 1770 restaurants
Romania		1330 hotels 1619 bars 2693 restaurants
Slovakia	9409 employees in accommodation domain 28676 employees in bars and restaurants	3643 accommodation establishments 4093 restaurants 389 bars

		72 dance clubs
Turkey		65 Entertainment facilities Accommodation facilities : 3830 National licensed, 7033 Municipality licensed Dining facilities: 518 Restaurants, 9 cafeteria, 386 Others

Education system

Country	Schools	Training levels
Austria	<ul style="list-style-type: none"> - Vocational education schools : <ul style="list-style-type: none"> o Secondary vocational schools medium level (20 schools) o Upper-level secondary vocational colleges (22 schools) - Vocational schools for apprentices <ul style="list-style-type: none"> o Berufsschulen approx. 13500 apprentices in tourism - University level <ul style="list-style-type: none"> o Universities of applied sciences in tourism (9 school sites) o Private universities (1 school) o Public universities (22 Universities) 	
Bulgaria		<ul style="list-style-type: none"> - Level 3 <ul style="list-style-type: none"> o 40% of employees - Level 4 <ul style="list-style-type: none"> o 50 % of employees - Level 6 <ul style="list-style-type: none"> o 10% of employees - Academic level <ul style="list-style-type: none"> o few employees
Croatia	<ul style="list-style-type: none"> - 91 VET Schools - Faculty of Tourism and Hospitality Management - private colleges, business schools and faculties 	<ul style="list-style-type: none"> - 2 years education <ul style="list-style-type: none"> o Assistant chef o Assistant waiter - 3 years education <ul style="list-style-type: none"> o Chef o Chef JMO o Waiter JMO o Confectioner JMO o Assistant chef and confectioner o Assistant chef and confectioner TES

		<ul style="list-style-type: none"> ○ Assistant waiter TES - 4 years education <ul style="list-style-type: none"> ○ Hotel and tourism technician ○ Commercial hotel and tourism commercialist
UK		<ul style="list-style-type: none"> - Training levels (In General, not specific to T&H sector) <ul style="list-style-type: none"> ○ level 4 and above 17.5% ○ Level 3 22% ○ Level 2 27.5% ○ Level 1 and entry level 22% ○ No Qualifications 11% - Learners classification <ul style="list-style-type: none"> ○ 476 Travel management ○ 4 395 Event management ○ 781 Tourism ○ 17 Tourism studies ○ 1 934 Tourism management ○ 1 371 Hospitality ○ 5 Hospitality studies ○ 1 625 Hospitality management ○ 5 454 Recreation, sport & leisure studies ○ 9 583 Hospitality, leisure, tourism & transport - 212 Hospitality, leisure, tourism & transport not elsewhere classified
Luxembourg	<ul style="list-style-type: none"> - Lycée technique hôtelier « Alexis Heck » Diekirch - Apprentissage hôtelier au Lycée technique de Bonnevoie - BBI-LUX, Wiltz (Private) 	<ul style="list-style-type: none"> - Service :25% level 2, 75% unqualified - Cooking:25% unqualified, 75% level 2 and 3 - Reception: 95% level 2 and 3 - Middle management in all sectors : level 2, 3 , 6 and 7 - Hotellerie-restaurant: level 3 and 4
Macedonia	<ul style="list-style-type: none"> - 8 high schools (2,6% of secondary students) - University education <ul style="list-style-type: none"> ○ BA in Hotel and restaurant management, in Tourism, in Gastronomy ○ MA in tourism management, in Hotel 	<ul style="list-style-type: none"> - 4 years education : Hotel and catering technician - 3 years education: Waiters, Chef, Confectioner/Pastry Cook

	management	
Romania		Existing qualification levels: <ul style="list-style-type: none"> - Upper secondary education - Post-secondary non-tertiary education - Short-cycle tertiary education - Master's or equivalent level
Slovakia	<ul style="list-style-type: none"> - 120 schools providing VET programmes for tourism and hotel management out of which 24 dedicated to services provision in tourism - 6 HEIs: <ul style="list-style-type: none"> o Department of Tourism and Food services, Faculty of Economics, MatejBel University in BanskaBystrica o Department of Tourism and Hotel Management, Faculty of Management, University of Presov o Department of Services and Tourism, Faculty of Commerce, University of Economics in Bratislava o Department of Tourism, Faculty of Central European Studies, Constantine the Philosopher University in Nitra o Department of Economics and Tourism, Faculty of Pedagogy, Catholic University in Ruzomberok o Faculty of Tourism, Goethe Uni Bratislava (private) 	
Turkey	<ul style="list-style-type: none"> - 49 Vocational High school - 2 Private Vocational High School 	<ul style="list-style-type: none"> - Level 2 <ul style="list-style-type: none"> o Room attendant o Houseman o Service man o Luggage attendant o Door attendant o Kitchen attendant o Scullery attendant

		<ul style="list-style-type: none">- Level 3<ul style="list-style-type: none">o Floor Supervisoro Public area supervisoro Service mano Hotel reservation officero Hotel phone operatoro Cook Pastry cook- Level 4<ul style="list-style-type: none">o Assistant housekeepero Bartendero Service mano Front desk attendanto Cook- Level 5<ul style="list-style-type: none">o Housekeepero Service Managero Front desk managero Kitchen manager- Level 6<ul style="list-style-type: none">o F&B Manager
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Inform / Promote / attract

Existing practices dedicated to the attraction of the T&H sector are really different depending on the country considered in the EU.EM.NET project.

Promotion activities

Marketing campaigns

Concerning marketing campaigns, 2 main categories can be put forward:

- Marketing campaign mainly dedicated to the attraction of customers (promotion of the country as a tourism destination). Countries that can be put in this category are Bulgaria, Luxembourg, Slovakia, Romania, Macedonia
- Marketing campaign dedicated to the promotion of the employment in the sector. UK, Austria, Turkey, and Croatia can be identified in this category.

Contests

In each country, contests are organised and participate to the promotion of the Jobs of the sector. This is mainly the case concerning the cooking domain. These contests are regional, national or European. Some of them are also promoted via media such as TV show.

Websites

Only 2 countries have website dedicated to the promotion of T&H sector employment:

- UK:
 - o <http://www.turijobs.co.uk/defaultuk.aspx>: international job search
 - o <http://www.allaboutcareers.com/careers/industry/hospitality-tourism.htm>: sector overview
 - o <http://www.uksp.co.uk>: Set by People 1st
 - o http://www.prospects.ac.uk/hospitality_tourism_sport_sector_overview.htm : UK's official graduate careers website
 - o <http://people1st.co.uk>
- Austria : www.ams.at

Some others (3) website where general information can be found on the sector

- Macedonia : [Tourism government program : http://vlada.mk/node/266?language=en-gb](http://vlada.mk/node/266?language=en-gb)

- Luxembourg: <http://www.visitluxembourg.com/en>
- Turkey: mtegm.gov.tr

Other considered countries have no real dedicated website.

Attract employees

Jobs visibility

Once again practices identified here depend of the country considered.

Firstly it has to be stress that across the different countries there is no common jobs identification and definition. When existing, each country has its own classification and definition. No transition is for the moment identified between countries.

At the country level:

- Thanks to a centralised structure UK and Austria are 2 countries where jobs visibility is good. Jobs are well identified, and described as well as career paths. For Austria the central source of information is www.ams.at and for UK people1st.co.uk.
- In other countries, the lack of coordinated structures makes it more difficult to clearly identify jobs in the sector. Some tentative exist in all the considered country but a more global and systematic approach is needed

Good HR practices

Main practices for attracting employees identified are:

- Flexible work arrangements
- Internship or summer jobs for student
- Mentoring of young people by more mature workers

Evolution of the sector

Skills need

The following table present an overview by country of the skills that have been identified as essential for the next coming years.

Austria	<ul style="list-style-type: none"> - Social media and internet - Social skills (mainly communication) - Language skills - Leadership skills for manager
Bulgaria	<ul style="list-style-type: none"> - Foreign languages - Marketing - Accounting - HR management - Entrepreneurship
Croatia	<ul style="list-style-type: none"> - Use of modern technologies - Foreign languages - Communication skills - Social skills - Problem solving - Innovation - Soft Skills - Management and Leadership skills
UK	<ul style="list-style-type: none"> - IT and Social Media - Management and Leadership : product excellence, managing a more diverse flexible workforce, autonomy and responsibility, finance management - Customer service skills - Marketing and e-marketing - Catering to guests/customers from abroad - Business support services
Luxembourg	<ul style="list-style-type: none"> - IT and social media - Higher qualified professionals - New legal regulation knowledge
Macedonia	<ul style="list-style-type: none"> - Foreign languages - Communication skills - Soft skills : Self-initiative, team work, leadership, creativity
Romania	<ul style="list-style-type: none"> - ICT and modern equipment - Foreign languages - Communication skills

Slovakia	<ul style="list-style-type: none"> - ICT - Communication skills - Foreign languages - Flexibility (in order to answer to the diversity of clients)
Turkey	<ul style="list-style-type: none"> - IT skills - Foreign language - Intercultural relations - Kitchen services

In each country, the preoccupations regarding skills need seem to be quite similar. **IT and social media** are skills that need to be taken into consideration in order to adapt to the new trend push forward by the expansion of internet. **Communication** skills and more particularly **foreign languages** are also a constant preoccupation in all country. The development of **social skills** in order to adapt the offer to the new globalized demand (intercultural relations, adaptation to customers from abroad,..) is also to be taken into account. Finally, more **management skills** are also put forward in nearly all the countries (marketing, leadership, adaptation to new regulation, etc...).

Skills anticipation in the sector

The present paragraph resumes what has been observed in the different countries, regarding skills anticipation.

As stated in the Best practices report, 3 main categories can be identified regarding skills anticipation practices:

- Macedonia, Luxembourg and Romania are 3 countries where there are no real identified practices. No anticipation is done in the sector; no coordination exists between the sector's actors. Skills need identification relies on market reaction to problem encountered in daily work.
- In Croatia, Turkey, Slovakia and Bulgaria practices are progressively spreading out. For the moment they are more informal than formal, but a structuration is emerging.
- Finally in Austria and UK, practices have been in place for a few years now and are well identified and fully operational.

Actors' implication

Depending on the 3 categories mentioned previously, actors' implication is quite disparate; from no coordinated implication for the Macedonia, Luxembourg and Romania, to a fully integrated approach managed thanks to one unique council in Austria (AMS) and UK (People 1st).

Impact of quality and certification process

The definition and deployment of a quality and certification process in the different countries (when existing) has a direct consequence on the skills anticipation process. This is what actually drives the evolution of skills anticipation in some countries like Croatia, Turkey, Slovakia, and Bulgaria. Indeed, evolving towards NQF implies a more coordination between VET actors, Public bodies and the market, and as a consequence a more coordinated approach of skills anticipation (in all sectors, not only T&H one)

For more detailed information on skills anticipation in the partners' countries, please refer to the "Best practices report".

Resume

The Synthesis report is one of the result documents of the Analysis of the state of play in the T&H sector for the countries involved in the EU.EM.NET project. It provides a global overview, resuming the analysis conducted in the project and puts forward the main common points and differences between the 9 investigated countries.

There is a large diversity of situations in the different partners' country. First of all the size of the studied countries, and as a result the size of the T&H sector, goes from small country such as Luxembourg to big one such as Turkey. However, it can be stated that (in countries where figures are available) the percentage of the total employment for the T&H sector is around 6 to7 %. Regarding actors of the T&H sector, 3 main categories can be identified (Public bodies, VET institutions and actors, Private associations of employers). However, depending on the country, their role and responsibilities are different. It has also been put forward that in some countries everything is centralised at the national level and in others not. The education systems are also different. Countries that are already involved in the process of training standardisation are also the ones that are the most advanced in the skills anticipation management. Putting in place national qualification framework (NQF) has a direct impact on the cooperation between VET institutions, public bodies and professional of the sector, and as a consequence on the level of implication of these actors in the skills' anticipation process.

In each country, the preoccupations regarding skills need seem to be quite similar, in most countries it is: IT and social media; communication skills and more particularly foreign languages; social skills in order to adapt the offer to the new globalized demand (intercultural relations, adaptation to customers from abroad,..); and management skills.

Regarding skills anticipation practices, 3 main categories can be identified:

- Macedonia, Luxembourg and Romania are 3 countries where there are no real identified practices. No anticipation is done in the sector; no coordination exists between the sector's actors. Skills need identification relies on market reaction to problem encountered in daily work.
- In Croatia, Turkey, Slovakia and Bulgaria practices are progressively spreading out. For the moment they are more informal than formal, but some structuration is emerging.
- Finally in Austria and UK, practices have been in place for a few years now and are well identified and fully operational.

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