

EU.EM.NET Project W.P 2

Country report : Slovakia

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Characterisation of the T&H sector in Slovakia

At national level, since November 1, 2010 responsibility for tourism in Slovakia rests with the Ministry of Transport, Construction and Regional Development of the Slovak Republic - the Tourism Section (before it was competence of the Ministry of Economy of the Slovak republic).

Slovak Tourist Board is an organisation receiving contributions from the State Budget specialised on marketing and state promotion of tourism in the Slovak Republic. It markets tourism at the national level, provides information on travel opportunities in Slovakia, promotes Slovakia as a travel destination, contributes to creation of a positive image of Slovakia abroad and supports the sale of travel products of the Slovak Republic. SACR has been authorised to officially represent the country abroad and establish detached offices both at home and abroad.

As a result of public service reform in 2001, the competencies with respect to tourism were devolved from a local civil service (district and regional offices) to eight self-governing bodies (regional governments – Bratislava, Trnava, Nitra, Trenčín, Žilina, Banská Bystrica, Prešov, Košice) and municipalities. The aim was to strengthen local competencies within the regions and localities which tourists visit, with the municipalities and cities playing the key role in establishing the preconditions for tourism development.

The Tourism Section of the Ministry of Transport, Construction and Regional Development organizes regular working meetings with the representatives of these self-governing bodies in charge of tourism. Their purpose is to co-ordinate the development of tourism in particular regions.

In addition, self-governing regions and Association of towns and villages of Slovakia are also important actors that are influencing the T&H sector.

At local level, local self-government - municipalities and towns - plays an important role in the development of tourism at local level and in co-ordination of entities in connection with this development.

Tourism associations as professional entities also contribute to the development of tourism at local and regional level.

New legislation coming into action as of December 2011 (Act 91/2011 Coll.) enabled creation of regional and local tourism bodies with members including regional and local authorities, private entrepreneurs, and civil society organisations. 4 Regional tourism organisations and 34 Local tourism organisations were registered so far and these relatively new actors have great potential also as communication platform between public bodies and entrepreneurs/employers.

For illustration, here are the areas of activities of these new actors according to their statutes:

- a) supports the work of its members in creation and implementation of the concept of tourism development within its scope,
- b) creates and implements marketing and promoting tourism for its members and the community at home and abroad,
- c) promotes the common interests of its members,
- d) cooperates with municipalities to develop land within its scope, including processing and implementation of programs of aid and development,
- e) promote the cultural, social and sporting life and the preservation of natural and cultural heritage,
- f) organize events for residents and visitors,
- g) provides its members with advisory and consulting services,
- h) prepares and submits projects for tourism development and ensure their implementation;
- i) promote sustainable tourism development in order to protect and maintain the environment of all the sites and respect the way of life of the local population and to respect the property rights
- j) establish and implement long-term and short-term strategy for the region's tourism, with their own analyzes, regional and national policy of tourism development,
- k) in cooperation with the municipalities that are members, prepare and implement an annual plan of activities and monitoring report on the development of tourism in their area,
- l) initiates or provides for the creation, management and presentation of tourism in their area,
- m) prepares an annual plan of activities to be approved by the General Assembly,
- n) updates the integrated information system in its scope,
- o) showcases products, activities and value destination in its territory, in cooperation with municipalities, members of regional organizations and representatives of the professional community,
- p) compiles an annual report to be published on its website,
- q) may set up, establish or operate a tourist information office,
- r) provides production and distributes printed, audiovisual and multimedia promotional materials of the region as a tourist destination,
- s) ensure participation in international exhibitions and fairs of tourism.

Employers in T&H sector

Employers in TH sector are organized in the Slovak Tourism Association (Zväz cestovného ruchu, www.zcrsr.sk). It is a voluntary non-political and professionally oriented organization of employers in tourism. It was formed in 2011 and it is composed of representatives of the nationwide associations of tourism. This body is the main consultation partner for the policy-makers in the section of tourism.

The actual members are the Association of Hotels and Restaurants of the Slovak Republic, Slovak Association of Tour Operators and Travel Agents, Bratislava Hotel Association, Lavex - cableways and ski

lifts, Historical Hotels of Slovakia, Slovak Association of Rural Tourism and Agro Tourism, the Slovak Tourist Guides Associations, Association of Slovak Spas, Association of Slovak Information Centers and the first entrepreneur subject TATRY MOUNTAIN RESORT plc. The association will further spread out by other associations of tourism both on national and regional level and is open also to other entrepreneurs. The priorities of the Association are the unification of the tourism branch, active approach to legislative changes in the area of tourism, more intense co-operation with the Slovak Tourism Association in promoting Slovakia and supporting the domestic tourism.

President: Mr. Mgr. Marek Harbuľák, secretary general of the Association of Hotels and Restaurants of the Slovak Republic (since January 2013).

(Note: Many members of the Slovak Tourism Association were previous members of Association of commerce and tourism of the Slovak republic (Zväz obchodu a cestovného ruchu Slovenskej republiky, www.biznis.sk), but they felt their voice diminished in comparison with the stronger commerce section, so they decided for own representing body.)

General description of the sector:

TH sector in Slovakia is rather fragmented and lacking coherent actions, which is regularly raised by the employers in the sector.

Collection of data within the sector of tourism is rather problematic because of this fragmentation. Each actor has developed own methodology and definition of what should be included into the heading „tourism“. Different data are processed by the Ministry of Transport, Construction and Regional Development of the Slovak Republic - the Tourism Section, different data by the National Office of Statistics, and different by the Ministry of Education, Science, Research and Sport of the Slovak Republic. There is communication between these bodies about this issue, but solution and common approach was not found so far.

Satellite account for tourism is in the phase of development by the National Office of Statistics. The methodology nad reference descriptions of occupation is changing (form former national classifications to SK NACE classification). Data for 2005-2010 were processed so far, and published in „Informational report 2013“. This report states that in 2010, the share of tourism on GDP was 2,7 %, and tourism created 353 000 „employment positions“ (recalculated to full time jobs), out of which 78,3% jobs were occupied by employees and 21,7% by self-employed. No more recent data are provided and the methodology is still under development. (http://portal.statistics.sk/files/Sekcie/sek_600/satelitny-ucet-cestovneho-ruchu-sr-2013.pdf, in Slovak)

Main figures

For the purpose of this survey, general data for 2011 were taken from an abstract of a private survey Travel and Tourism in Slovakia: Key Trends and Opportunities to 2016 by Trimetric (available at www.marketresearch.com): Slovakia's travel and tourism sector generated 2.4% of the national GDP and created 138,000 jobs, representing 6% of the country's total employment in 2011. Of the total jobs created through the travel and tourism sector, 55,000 jobs were direct industry jobs, while 83,000 jobs were created through the travel and tourism supply chain. Travel and tourism is a dynamic business in Slovakia. There are over 20,000 enterprises involved in tourism services in the country. (<http://www.marketresearch.com/Trimetric-v3917/Travel-Tourism-Slovakia-Key-Trends-7036725/>)

Accommodation establishments in Slovakia in 2012:

- Accommodation establishments in total: 3643
 - o A. Collective accommodation Establishments: 2907 of which
 - Hotels (motels, boatels) and guest houses: 1473 of which
 - Hotels (motels) ***** , ***** 128
 - Hotels (motels) *** 284
 - Hotels (motels) ** 130
 - Hotels (motels) * 114
 - Mountain hotels *** to * 75
 - Congress hotels ***** to * 17
 - Boutique hotels ***** and ***** 6
 - Spa hotels ***** to *** 7
 - Wellness hotels***** to *** 13
 - Guest houses (Bed&Breakfast) 814
 - Tourist residence 350
 - Cottage colonies 63
 - Other collective accommodation establishments: 996 of which
 - Camping sites ****, ***, **, * 70
 - Other 926
 - o B. Accommodation establishments in private: 736

Number of Restaurants and Bars in 2012:

- Restaurants 4093
- Bars 389
- Dance clubs 72

Employment in accommodation and restaurants in 2011

revenues	Number of employees	Average salary (brutto)
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Accommodation		
305,6 mil EUR	9409	552 EUR
Restaurants and bars		
799,4 mil EUR	28676	358 EUR
together		
1 105,0 mil EUR	38 085	406 EUR

Source: National Office of Statistics, www.statistics.sk

Employees by Economic Activities (NACE Rev. 2) in thousands of individuals in the economy for the years 2009 and 2012: In item „I Accommodation and food service activities“ in 2009 was employed 89,9 thousands of individuals, what was 4,51% of employed, and in 2012 it was 87,7 thousands of individuals, what was 4,45% of all employed.

Source: Office of Labour, Social Affairs and Family (full chart of all sectors available)

Main considerations to be taken into account regarding the main figures

There is a severe lack of comparable and complex data. T&H sector is characterised by strong fragmentation and lack of definition caused by the intersectorality/transversality of the input composition of the tourism industry.

The problem of data in T&H sector is to a great extent caused by the fact that employers in this sector are mainly SMEs, who are almost impossible to reach in terms of data (or any intelligence) collection by the authorities (i.e. extremely low rate of return of survey forms). The various employers' and professional associations (not just in the tourism sector of Slovak economy) don't reach critical mass of membership, as this is not compulsory, to represent the sector accordingly.

Inform / Promote / attract

There are no promotional activities in this field. The reason is that the sector is already overwhelmed with graduates from VET programmes aimed at tourism, who often end in the Labour Offices as registered unemployed. A need to decrease number of graduates in this field is sought rather than motivation to enter it. The serious issue concerns the quality of the education system and the graduates, not the quantity of people motivated to choose this sector. In 2012, 19 674 graduates graduated from the study programmes 63 and 64 „Economics, trade and services“, what is 9,3% of all VET graduates in 2012. Registered unemployed graduates of these programmes represented 18,7% of all registered unemployed in 2012.

Jobs in the sector of tourism are seen among general population, especially parents, as easy and pleasant compared to technical sectors, so it is already quite popular with students.

Promotion and marketing around the T&H sector in Slovakia

There are no marketing campaigns to attract employees. The only marketing concept of tourism is aimed at potential tourist/service users – promotion of Slovakia and its parts as tourist destination. This type of marketing activities is within the responsibility of the Slovak Tourist Board (www.sacr.sk).

In this matter Slovakia also cooperates with other V4 countries (Czech republic, Poland, Hungary) under the initiative European Quartet (<http://www.european-quartet.com/>) , where they organize common promotional activities, such as online campaign or roadshows.

In September 2013 Slovak Tourist Board will participate in roadshow in Latin America and in Russian Federation under the initiative European Quartet (see question no 6).

There is plan by Ministry of Transport, Construction and Regional Development - Tourism Section to prepare a campaign aimed at employers in the T&H sector that will raise their awareness on the importance of quality of the services they provide. This campaign will be a part of National System of Services Quality which was approved in July 2013 by the Government as a part of Strategy for Tourism Development 2020, and its implementation is planned for 2016-2017.

Promotion is sometimes made via sector organisations promoting **contests at regional, national and European level**

Regarding the promotion towards, the **young** generation, a project aimed at promotion of VET-type education is campaigned at primary schools within a National Project coordinated by State Vocational Education Institute (SIOV, www.siov.sk), but this one emphasizes the technical fields (electrotechnics, IT, etc). This project is run because the participation of students in VET education is constantly decreasing, as the parents and children prefer general education, which is causing disparity between skills needed at the labour market and human resources leaving the educational system.

T&H jobs visibility in Slovakia

There is lack of commonly agreed definitions and delimitations of respective jobs among relevant actors. It is expected that this will be diminished significantly by implementation of a **national project called National System of Occupations** (Národná sústava povolání, NSP, www.sustavapovolani.sk), introduced in Act. 5/2004 on employment services and on amendments to certain laws. It is national, single information system description standard for particular jobs. **NSP** should establish requirements for professional skills and practical experience to perform work activities in the labour market. The core of the NSP is the Register of occupations based on employment standards, which will include requirements imposed by employers on a qualified job performance. Register of occupations is created on a platform of sector councils, which included experts from various sectors of economic activity, the central and regional authorities, employers' associations, trade unions, government bodies, local governments, associations, chambers of commerce, education and research sector. This national project started in July

2009 and finished in June 2012, but the database is still not complete, and the following lists don't claim to be exhaustive.

According to current **Register**, under the heading "Accommodation, tourism and hazard" the following occupations are listed:

- Master's or equivalent level
 - o Front Office Manager at Tourist Information Centre
 - o Destination Management Specialist
- Bachelor's or equivalent level
 - o Back Office Employee at Tourist Information Centre
 - o Front Office Employee at Tourist Information Centre
 - o Manager of a Recreational Centre
- Post-secondary non-tertiary education
 - o Front Desk Manager
- Upper secondary vocational education
 - o Receptionist
 - o Local Guide

According to current Register, under the heading "Gastronomy" the following occupations are listed:

- Post-secondary non-tertiary education
 - o Manager of Accommodation Facility or Food-serving Facility
- Upper secondary vocational education
 - o Bar/Cafe Manager
 - o Manager of a Fastfood-providing Facility
 - o Manager of a School Cantine
 - o Manager of a Cantine
 - o Chef
 - o Sommelier
- Secondary vocational education
 - o Bartender
 - o Waiter
 - o Cook
 - o Foodserver
- Lower secondary vocational education
 - o Kitchen Assistant
- Lower secondary education
 - o Fastfood/Buffer Assistant

In addition, related national project managed by **Ministry of Labour, Family and Social Affairs** called **Labour Market Integrated System** (Integrovaný systém typových pozícií, ISTP, www.istp.sk). **ISTP** is a database of all existing jobs in the Slovak labour market, as well as counselling tools that are useful for finding a job corresponding to educational attainment, experience, knowledge and skills. ISTP has been operating since 2003. The reason for its creation was high unemployment, which necessitated the need to improve and optimize advisory and brokerage services of labour offices. But the system needs considerable update, which was already contracted to the Office of Labour.

According to current **ISTP database**, under the heading “Accommodation, tourism and hazard” the following occupations are listed:

- Master’s or equivalent level
 - o Front Office Manager at Tourist Information Centre
 - o Destination Management Specialist
- Bachelor’s or equivalent level
 - o Back Office Employee at Tourist Information Centre
 - o Front Office Employee at Tourist Information Centre
 - o Manager of a Travel Agency
 - o Manager of a Recreational Centre
- Upper secondary vocational education
 - o Front Desk Manager
- Lower secondary vocational education
 - o Animator
 - o Employee of a Travel Agency
 - o Delegate of a Travel Agency
 - o Croupier in a Casino
 - o Hostess
 - o Receptionist
 - o Cableway/Ski lift operator
 - o Local Guide
 - o Travel Guide
 - o Chef
 - o Employee at Spa/ Wellness
 - o Housekeeper
 - o Lifeguard

According to current ISTP database, under the heading “Gastronomy” the following occupations are listed:

- Post-secondary non-tertiary education

- Manager of Accommodation Facility or Food-serving Facility
- Upper secondary vocational education
 - Bar/Cafe Manager
 - Manager of a Fastfood-providing Facility
 - Manager of a School Cantine
 - Manager of a Cantine
 - Chef
 - Sommelier
- Secondary vocational education
 - Bartender
 - Confectioner
 - Waiter
 - Cook
 - Butcher or small goods maker
 - Baker
 - Foodserver
 - Vendor in Fastfood/Bufferet
 - Lower secondary vocational education
 - Kitchen Assistant
- Lower secondary education
 - Fastfood/Bufferet Assistant

The **NSP** database is not complete yet, so the employers don't use it. Awareness of this database among employers is also very low.

The **ISTP** database is not known to many employers, despite a campaign involving 2 popular Slovak entertainers launched in 2008 and updated in 2011. So it is used to a very small extent, if at all. It is also not exhausting in terms of job roles lists.

No real career paths are defined but preconditions to enter the next level of career are set by the need to obtain specific level of education (qualification). Qualification needed for specific positions can be found in respective legal acts, especially the Act on Trades and Crafts no. 455/1991 as amended.

But in general, the term career path in a complex way describing possibilities of advancement in one career (in terms as we know in career guidance) has not been defined for the sector yet.

Existing **associations** in the sector:

- Slovak Tourism Association (Zväzcestovnéhoruchu, www.zcrsr.sk). It is a voluntary non-political and professionally oriented organization of employers in tourism. It was formed in 2011 and it is composed of representatives of the nationwide associations of tourism. This body is the main

consultation partner for the policy-makers in the section of tourism. Its members are other associations:

- Association of Hotels and Restaurants of the Slovak Republic (www.zhrsr.sk) ,
- Slovak Association of Tour Operators and Travel Agents (www.sacka.sk),
- Bratislava Hotel Association (bha@bha.sk),
- Lavex - cableways and ski lifts (www.lavex.sk) ,
- Historical Hotels of Slovakia (www.historickehotelyslovenska.sk),
- Slovak Association of Rural Tourism and Agro Tourism (www.agroturist.sk),
- Slovak Tourist Guides Associations (www.ssscr.sk),
- Association of Slovak Spas (www.ask.sk),
- Association of Slovak Information Centers (<http://www.aices.sk>)
- Association of commerce and tourism of the Slovak republic (Zväzobchodu a cestovného ruchu Slovenskej republiky, 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)

Note: Many members of the Slovak Tourism Association were previous members of Association of commerce and tourism of the Slovak republic (Zväzobchodu a cestovného ruchu Slovenskej republiky, www.biznis.sk), but they felt their voice diminished in comparison with the stronger commerce section, so they decided for own representing body.

In the past there was created an Association of B&Bs and small accommodation providers, but it ceased its operation. Collaboration issues among SMEs are perceived quite strong.

Develop and Train Workforce

The Ministry of Education, Science, Research and Sport of the Slovak Republic is the central body of the state administration of the Slovak Republic for elementary, secondary and higher education, educational facilities, lifelong learning, science and for the state's support for sports and youth (www.minedu.sk) .

Important actor in VET coordination is State Vocational Education Institute (SIOV, www.siov.sk). SIOV carries out activities aimed at enhancement of VET policy-making and implementation on the national level.

Other agencies under the responsibility of the Ministry of Education influencing the VET are:

National lifelong learning institute is responsible for creating and updating the National Qualification Framework and is involved in the creation of a national system of qualifications, system monitoring and

forecasting of training needs and providing the tools, networks and network consulting services, recognition of further education in the Slovak Republic. (www.nuczv.sk)

National Institute for Certified Educational Measurements is a state budget organization that provides evaluation of the quality of education at primary and secondary schools at the level of national educational programmes and implementation of certified educational measurements at national level. (www.nucem.sk)

Methodology and Pedagogy Centre (Institution for in Service Teachers' Education and Training) is a unified organization of continual education of teachers that covers whole Slovak Republic. (www.mpc-edu.sk)

Data for the VET providers size description were taken from Ministry of Education's Institute of Information and Prognoses of Education (Ústav informácií a prognóz školstva, www.uips.sk, it is a budgetary organization with legal personality under founding authority of the Ministry of Education, Science, Research and Sport, whose main function is production of information to support management and development of areas falling within the management responsibilities of the Ministry of Education. But the view of reference point to „tourism“ may be different in various sets of data from different sources (there are different areas counted under the heading tourism).

Number of schools providing VET programmes aimed directly at tourism and hotel management is 120 out of the total number of VET schools 509 in Slovakia. Out of this 24 VET schools are aimed at services provision in tourism, so called „Hotel academies“ (hotelové akadémie in Slovak). (www.uips.sk)

In higher education, there is a department of tourism at 6 Higher Education Institutions (HEIs) out of 37 Slovak HEIs:

- Department of Tourism and Food services, Faculty of Economics, Matej Bel University in Banská Bystrica
- Department of Tourism and Hotel Management, Faculty of Management, University of Prešov
- Department of Services and Tourism, Faculty of Commerce, University of Economics in Bratislava
- Department of Tourism, Faculty of Central European Studies, Constantine the Philosopher University in Nitra
- Department of Economics and Tourism, Faculty of Pedagogy, Catholic University in Ruzomberok
- Faculty of Tourism, Goethe Uni Bratislava (private)

Existing training and qualification levels in Slovakia

There is, for the moment, no data on qualification level available in Slovakia yet.

According to the information presented by the Central Office of Labour, Social Affairs and Family, method to analyze the employability and location of employees according to their education obtained in specific fields of study and training in various colleges and universities has been developed and successfully pilot tested. According to the Central Office of Labour, Social Affairs and Family, this methodology allows to compare codes and names employments (according to the current classification of occupations ISCO SK-08) and the codes and names of departments of education on the basis of the current classification of Education Branches (KOV – a Slovak code), resp. under the new National Classification of Education ISCED 2011. In the future, these analyses may be an important information base evaluating economics of education.

There is actually an effort which is actually made by one association in order to encourage and promote the importance of the development of management supervisory skills. This actor is the Junior Achievement Slovakia, non-profit organisation (www.jasr.sk).

Junior Achievement Slovakia is a leader in business education in Slovakia and recognized partner for the public sector, the business sector, professional associations and chambers of commerce. Work organization provides 8 full-time employees in three offices in Bratislava, Banská Bystrica and Košice. The Management Board is composed of representatives of leading foreign and domestic firms and in addition it is to support organizations involved other companies and businesses throughout Slovakia.

JASR provides various tailor-made educational modules upon the consultation with the educational institutions. One of the 2 all-year programmes is: Doing Business in Tourism - subject approved by Ministry of Education, Science, Research and Sport with the course implementation during one or two years. (Content of the program: theory + fieldwork + work with websites + work in student companies in the field of tourism).

Evolution of training needs

Since 1993, the education system in the Slovak Republic passed more reform changes. By 2001, changes were implemented largely spontaneously, without any deeper analysis of the course as well as the impact of changes. In 2001, the Government approved the National Programme of Education of the Slovak Republic for the next 15 to 20 years - Millennium. The document named basic assumptions and principles of change in education. Following the Millennium, in 2003, decentralization in education was initiated while significantly changed the funding of regional schools.

Changes in economic conditions and economic opportunities in the Slovak Republic have caused the disappearance of traditional employers, reorientation of production and services, the emergence of small employers - small businesses, the arrival of new foreign investors, which logically led to new demands and requirements of employers to expertise, practical skills and abilities of graduates of study and training branches vocational schools.

Fundamental reform step was the adoption in 2008 of a comprehensive law on education (the Education Act). The basic element of the reform is that education and training in schools is carried out through educational programs. In addition to the common curriculum for all schools as a part of each school defines its subject matter, thereby promoting freedom schools. The new law strengthens the teaching of foreign languages, information and communication technologies, and information education.

Quality and certification in Slovakia

Strong problem in VET in Slovakia is the lack of quality. Report on state-of-the-art in Education published in March 2013 by Ministry of Education confirmed that in VET there are no strong mechanisms for encouraging responsibility and no national policy of quality management has been adopted. One of the consequences is generally claimed low quality of services in Slovakia. This issue was not recognized in the past at all.

NQF in Slovakia

The first step was National System of Occupations. A fresh started national project aimed to support system of qualifications in general is the “Creation of the National system of Qualifications” implemented by the State Vocational Education Institute (ŠIOV, www.siov.sk). The project aims to create a National System of Qualifications, which has set the stage for the recognition of qualifications acquired through formal and informal education. At the same time, with this project the Slovak Republic will fulfil the tasks set by the European Union - the establishment of the National Qualifications Framework as a tool for comparing qualifications by referencing them to the European Qualifications Framework and tools supporting their transfer and recognition in the European area. The second register - National System of Qualifications - is to offer citizens a comprehensive view of the qualification system of the country, their grading, paths leading to their acquisition or recognition, legislation dealing with qualifications in specific cases - for example, for regulated professions, and so on.

However its adoption is difficult due to a lack of awareness and a lack of engagement.

At **the international level**, system of international mobility is working, especially within the European mobility schemes. But international mobility is usually also seen as something extra for the pupils, some kind of “reward”, and the pupils usually have to catch up with the regular subjects when they return (acceptation of the credits from abroad is rather rare, if any).

There is a system of automatic recognition of education with the Czech republic (education achieved in Czech republic is automatically recognized and vice versa).

The credit system and recognition is planned to be redesigned into a more working form within the national project National System of Qualifications, which started only in March 2013.

Training organisms and employer's link; development of curricula in Slovakia

Between 2001-2007 resonated opinions that mechanisms, that should ensure participation in financing of vocational education and training operating on the basis of social partnership, don't exist. Cooperation between ministries in creation of policy concepts had not the character of social dialogue, but remained based on the commenting of circulated legal proposals. But the most lacking was the activity of the employers' associations, which did not come with the plans and objectives of vocational education and training. In this situation occurred loss of interest of students in VET. This situation was signalled by the schools, as well as employers. Negative influence was strengthened also by the demographic situation, but also reduction of the time allocated to practical teaching in VET schools.

Cooperation between the spheres of employers and vocational education bore signs of voluntary training to a certain spontaneity, was limited to certain forms of cooperation, such as were field trips enable students implementation of professional practice and training, material assistance or sponsorship funds, participation and membership of practitioners in expert committees. Existing applicable standards governed the relationship and individual activities or tasks of employers towards VET only in part and not in the required extent.

The issue of the instruments providing active input of employers in VET in secondary schools and school facilities has been marginally addressed in different legislation. Therefore, the Ministry of Education of the Slovak Republic in 2008, decided to establish a comprehensive legal standard that will address the issue of VET schools and school facilities comprehensively.

By modifying the Act on Vocational Education and Training, which entered into force on September 1, 2009. The Act lays down conditions to ensure vocational education and training students in accordance with the needs of the labour market status and roles of actors coordination of VET for the labour market in providing vocational education and training, financial security and material welfare of pupils and the establishment of Development Fund for VET (note: the fund did not start its operation). The law itself, despite its name, does not regulate the process of vocational education and training as part of the educational process in secondary vocational schools, but it is rather a law on support mechanisms for vocational education and training.

The Act establishes a system for coordinating training for the labour market that determines the participants in the system, establishing their rights and responsibilities and establishes the basic mechanisms of the system. The whole system is built on the quadripartite cooperation entities supporting the process of vocational education and training. These include the state administration, the local self-government, employers and employees. Coordination takes place at two levels and on the national level and at the county level.

Involvement of employers in vocational education and training is provided by planning educational needs of the labor market, cooperation in creating new curriculum and innovation in the existing

curriculum, cooperation in the implementation of vocational education and training, and sharing reviews on the quality of vocational education and training in the VET schools.

The main objective of the Act is to encourage employers to enter into the process of VET that should also ensure the increase of quality of VET.

Ministry of Transportation – Tourism Section addressed the issue of low quality of services in the T&H sector in new Strategy of tourism development 2020 (approved by Government in July 2013), by launching a big national project National System of Quality of Services in T&H.

Partnerships between schools and employers

Placement of VET students in companies is working on individual basis. There is no national regulation, so it is upon the discretion (and activity) of the school management. The legal framework enables it, but doesn't set precise rules. If the school director manages to agree on partnership with companies and set the rules, the students can spend some of their time in companies.

Currently a novelisation of the Act on VET is being prepared with the aim to introduce the dual system, but it is in the stage of design yet.

There are possibilities for VET pupils to get extra certifications within their studies (within the regular course), but that are usually paid. Sometimes the VET schools provide for part of the fee. The system of accreditation of such courses is just being developed and is not operational yet.

VET schools oriented on T&H usually have partnerships with local tourism and hospitality services providers. Most of the VET schools implement the cooperation in a way of a study subject "Practice", where the student is placed in a cooperating establishment or the student has to/can find a place himself/herself. This leads to a problem of formality, where the employers "stamp" the report of students, even though the student is not involved in the operation of the host establishment.

System of international mobilities is working and the VET schools build partnerships, especially within the European mobility schemes. But international mobilities are usually also seen as something extra for the pupils, some kind of "reward", and the pupils usually have to catch up with the regular subjects when they return (acceptation of the credits from abroad is rather rare, if any).

Employers' involvement in the shaping and design of training

Employers have according to new Act on VET direct responsibilities to participate at the creation and regulation in VET, and to support public authorities.

According to the §5 of the Act 184/2009 on VET and its amendments the employers have the following role:

- (1) The employers are involved in the creation of profiles of graduates of vocational education and training and to determine the required knowledge, skills, abilities and work habits.
- (2) The employers create conditions and provide material and technical support for practical teaching in secondary vocational schools, centers of practical training, workplaces of practical training, centers of professional practice, school management, healthcare centre or workplace under conditions laid down in this Act or a collective agreement.
- (3) Professional and employers' associations :
 - a. cooperate with the Central Office of Labour, Social Affairs and Family in the development of analyzes and forecasts of the labour market,
 - b. establish the requirements of the labour market for skilled labor,
 - c. prepare to determine the requirements for professional skills and practical experience necessary to perform work activities to jobs in the labour market,
 - d. participate in the creation of profiles of graduates of vocational training and required knowledge, skills, abilities and work habits, norms material-technical and spatial requirements in collaboration with the Ministry of Education,
 - e. gives opinion on the content of the theoretical component of the training school leaving examination, the content of the practical training component of baccalaureate, graduate exam content and the content of the final examination
 - f. participate in the creation of textbooks, teaching aids and textbooks
 - g. may provide material-technical and spatial assistance to vocational school, practical training centers, school management, vocational practice and healthcare centres, ,
 - h. can provide expert practitioners for the purpose of continuous education for teachers of vocational subjects and practical training teachers under a special regulation,
 - i. provide training for instructors,
 - j. provide training for delegated representatives of the professional organization and trade association for members of the commission for the theoretical part of the training component of the school-leaving exams, practical part of the training component of baccalaureate, graduate exams and final exams,
 - k. cooperate in the development of educational curricula to the needs of secondary vocational schools,
 - l. develop methodology for the participation of a representative professional organization for the theoretical part of the training component of the school-leaving examinations, practical training component of baccalaureate, graduate examination or final examination.
- (4) The Ministry of Education in collaboration with professional organizations generally binding legal regulations substantive scope of the professional association or guilds association to different fields and trades union education system.

The communication between employers and public authorities is organized within various consulting bodies – councils, in order to implement the tasks stipulated in the aforementioned Act. Employers participate the following Councils for consultation with policy-makers:

- Sectoral councils for VET under the Act on VET – were established under the aforementioned §5 of the Act on VET in order to practically enable the communication and implementation of the tasks. But as the national projects National System of Occupations and National System of Qualifications have established sectoral councils with the same aims and members, the employers' representatives asked for dissolution of the sectoral councils under Act on VET for the reason of duplicity. With the most recent amendment of the Act, since 1 May 2013 these sectoral councils were omitted from the Act.
- Governmental Council for VET – meetings on the highest level, chaired by the Minister of Education, with participation of employers' representatives, ministries, self-governing regions, trade unions and other relevant public authorities representatives, discussing current issues and looking for solutions. Within the Council operates 15 specific working groups – T&H should be covered by working group Economy, Commerce and Services. The Council was established on 27 October 2009 and since then 8 general meetings and 4 meetings of working groups took place (T&H is covered under working group Economy, Commerce and Services). During these meetings the participants have to prepare and present their view and requirements on the development of the VET education in Slovakia. After each meeting a set of tasks is distributed to the actors.

Sectoral Councils under the national project National System of Occupations – July 2009-June 2012:

20 sectoral councils were voluntary professional association of independent experts. They consisted of representatives of government bodies, local government bodies, employers' representatives, workers' representatives, educational and other institutions. Sector councils represent monitoring labour market needs in relevant sectors of the national economy and their transfer to the system of lifelong learning.

Their tasks are:

- guarantee a representative opinion sectoral council and regular updating of public information system NSP on current and future requirements of employers of skilled labour for the performance in the labour market in Slovakia
- representative monitoring the current status of the sector through key indicators, including forecasts of future developments,
- creating and updating the description of the situation on the labour market, especially in terms of skills needs in the sector, including its national and regional specificities through a comprehensive description of the standard demands of the labour market,
- filling information system NSP,

- declaration of future needs and demands of employers for skilled labour in the sector, taking into account national and regional specificities,
- professional labour market analysis, research projects and projections,
- cooperation with expert teams and the social partners to create favourable conditions for the transfer of the identified labour market needs in the lifelong learning
- creating partnerships with employers, schools, universities and other educational institutions certified to process validation and recognition of non-formal education,
- cooperation for the verification and validation of non-formal education on the basis of tests for verifying the competence,
- systematic and transparent public publicity and presentation of the results and outcomes of sectoral councils of professional and general public
- professional support and advice to employers to invest in skills and qualifications in order to increase productivity and competitiveness of the Slovak Republic.

This project was run until June 2012. It is expected that the tasks will continue in similar way under the national project National System of Qualifications, which started in March 2013.

Sectoral Councils under the national project National System of Occupations – March 2013-October 2015

In the project will be involved 26 sector councils, in which will bring together representatives of sectoral ministries, as well as employers, teachers, and practitioners in education and trade unions representatives. Overall, to the project will contribute over a thousand people.

The project aims to create a National System of Qualifications, which has set the stage for the recognition of qualifications acquired through formal and informal. At the same time these projects, the Slovak Republic to fulfil the tasks set by the European Union - the establishment of the National Qualifications Framework as a tool for comparing qualifications by referencing them to the European Qualifications Framework and tools supporting their transfer and recognition in the European area. The second register - National System of Qualifications - is to offer citizens a comprehensive view of the qualification system of our country, their grading, roads leading to their acquisition or recognition, legislation dealing with qualifications in specific cases - for example, for regulated professions, and so on.

Representation of T&H sector in these councils is considered rather weaker. It is usually combined with different areas of Slovak economy and the problem of definition hampers faster progress in the sector development.

Councils at the regional level

Each of the 8 self-governing regions in Slovakia has established a Regional Council in VET with the tasks derived from the Governmental Council on VET (similar tasks on regional level involving regional actors representing all the stakeholders).

For the purpose to encourage employers to enter into the process of VET, two motivational assumptions were created by the Act on VET no. 194/2009. The first, is a graduate of a VET school ready to work in accordance with the requirements of the employer, with an incentive to remain in employment with that particular employer. Second, and no less significant, motivation for employer to enter into VET, is tax incentives. Both motivations were created, resp. strengthened, by the Act on VET and the amending articles of the Labour Code and the Act on Income Tax.

These Acts preclude that the employer, for whom the student is preparing for a profession, can provide student financial and material security. If the employer concludes with a VET student an employment contract pursuant to § 53 of the Labour Code, the expenses incurred for the education of such student may apply as a tax expenditure. Such employment contract, may an employer conclude with a student before the end of the study, in the first day when he/she reaches the age of 15, while the employer, for which the student is preparing for a profession, may enter with a student into an agreement in which the student undertakes that after graduation remains with the employer for an agreed period of time, but not exceeding three years. Such an agreement may be concluded only when an employment contract is signed.

Although the Act on VET established mechanisms creating the conditions for entry of employers into VET, employers are still not sufficiently motivated to enter into this process. One reason may be that employers are unaware of the opportunities provided by Act, and are not sufficiently informed about bonuses, which they derive from their participation in VET. For the past two years, the proportion of secondary vocational school students performing practical work directly with employers decreased from 5.75% to 3.8%.

The **cooperation** between schools and employers in **other sectors** are working on a very similar basis as the ones in the T&H sector (see question no. 33). Difference can be observed in the automotive or electrotechnics, where big employers exist, but this cannot be transferred to the T&H sector, which is dominated by SMEs.

Retain workforce in the T&H sector in Slovakia

There is no system of encouragement in order to retain mature workers. Mature workers stay in the system (all above listed options are possible), but this is based on individual situation and agreements.

Concerning the combination of education and employment, students are mainly encouraged by the labour market itself, which prefers candidates with practical experience. In fact, the system discourages

them; in general there is a stronger pressure on theory and formal classes attendance than on practice. In reality, the students don't show much interest, which is only supported by the lack of interest of the parents. It is considered a sociological problem, but no coordinated actions have been implemented yet.

No real HR practices' strategies exist in Slovakia, despite the fact that the fluctuation in the T&H sector is identified as a problem for a long time already. As the main reason is usually identified a very low level of wages in the sector in Slovakia compared to other countries. But also other reasons may be relevant, as in some positions the wage is quite attractive, but skilled workers still prefer to work abroad.

Skills anticipation (forecasting) in the T&H sector in Slovakia

General situation

There is a strong identification problem in this field. No specific descriptions are available, despite the efforts to collect this kind of information. Employers in T&H, mostly SMEs, are not able to identify and state their future needs/expectations.

Main actors

The main actor for skills anticipation is Central Office of Labour, Social Affairs and Family, operating under the Ministry of Labour, Social Affairs and Family.

In the Programme Declaration of the Government is determined explicit objective "to build a system for anticipating labour market needs and skills so as to maximize the consistency between the demand for and supply of labour."

Law. 5/2004 Z.z. on employment services and on amending and supplementing certain acts as amended, § 12 obliges within the scope of the Labour, Social Affairs and Family "to develop analysis and forecasts of the labour market and publish them on its website."

According to the Act on VET no. 184/2009, the coordination of vocational education and is carried out at the national level, as well as at the regional level. According to § 5 par. 3 point a) "Guilds associations and professional associations cooperate with the Central Office of Labour, Social Affairs and Family in the development of analyzes and forecasts of the labour market" and under § 5. 3 point. b) " Guilds associations and professional associations produce labour market demands for skilled labour." Ministry of Labour, Social Affairs and Family of the Slovak Republic pursuant to § 3.4 point. a) of the Act publishes in cooperation with the Ministry of Education, Science, Research and Sport of the Slovak Republic twice a year on its website information on the employment of secondary school graduates in the labour market by individual regions, secondary schools, fields of study and training branches.

In order to ensure consistent implementation of the skills forecasting tasks, Office of Labour, Social Affairs and Family was contracted to extend the functionality of the Integrated System of Type Positions

(ISTP) to create a single electronic database of potential labour force and skills of job seekers in Slovakia. A single database of job seekers will recommend appropriate employment or education and training according to the needs and demands of employers defined in the National System of Occupations of the Slovak Republic (NSP).

As previously shown, the obligation of employers' associations to participate in anticipation is set by law. The employers' associations have to prepare skills needs analysis on annual basis according to the law. The level of information within each analysis is varying. It usually defines numbers of graduates of specific study programmes that will be needed in the sector in the upcoming years. Also, T&H sector is represented within a broader group of sectors, so it limits the details of the analysis. As a consequence, all assessments are prepared by employers' associations and are submitted also to the Ministry of Education.

Methods used

The first analysis of pilot qualified forecast developments in the labour market was presented at the meeting of Governmental Council for VET in June 2013 by the Central Labour Office. This analysis will be updated, expanded and refined at regular yearly intervals with a view to a permanent increase of completeness and professional level. Best estimates of expected future needs of skilled labour have been developed in active collaboration with the use of the data and technical studies of the association of employers' associations, employers in the Government Council for Vocational Education and Training "on the basis of cooperation under the Act 184/2009 Coll. of vocational education and training, as amended, focusing on the creation of technical and spatial conditions for professional growth and level of the employees of the Offices Labour, Social Affairs and Family, the application of positive experiences from abroad in connection with the creation of much needed employment and development strategies of individual sectors in Slovakia .

According to Central Labour Office, the resulting quantification of the labour market is the result of collaboration between employers' associations grouped under the "Employers' associations in the Government Council for Vocational Education and Training", which provided necessary assistance and materials for the quantification of labour market oriented vocational education.

This analysis is focused only on number of needed workforce, not what kind of skills this workforce will have to have in the future. It should be improved by completion of the national project Creation of National System of Qualifications.

Trends in the next 5-10 years

New skills :

- Language skills
- communication skills

- ICT skills
- flexibility to respond to the globalizing nature of clients and their expectations.

VET education system was rather rigid, formal and theory-focused. The adaptation of graduates to the market needs is very limited.

Promoting T&H professions Europe-wide

In Slovakia, seasonal T&H related work abroad is quite popular, but there are no exactly tracked numbers.

Skilled and qualified people in the T&H sector usually choose to spend some of their career abroad, but many have tendency to return home after several years.

Benefits

European standards in T&H are in general considered more advanced in comparison to Slovak. Therefore, the promotion, sharing of best practice and showing examples will enrich the Slovak environment and will be seen as help towards reaching the European level.

Risks

The risk perceived in Slovakia is the brain-drain, that the able and qualified will leave the country in search for better career opportunities.

Main evolution of the sector in the coming years

The output of the new report presented by the Central Labour Office (see question no. 50) consists of the following:

The first category "Number of employees" describes the anticipated development of the labour market in the years 2013 - 2017 based on assumptions of economic development and labour market unchanged at the current structure of employment.

The second category is "Additional need for employees' arrival", which is a need for additional staff in the labour market. This need is composed of two factors.

- The first factor is the change (increase or decrease) of the number of employees based on macroeconomic assumptions for the economy and labour market.
- The second factor is a necessary complement of employees in the labour market due to intergenerational exchange. For quantification of intergenerational exchanges were taken into account the expected number of employees retiring in maintaining currently valid legislation for the entire period (2013-2017).

Existing best practices in Slovakia

In the T&H sector

The issue of skills forecasting in Slovakia is a general problem and doesn't relate to the T&H sector only. Execution of proper analysis in terms to feed data for skills forecasting methods seems difficult at the moment. Responsibility for skills forecasting lies now within the Office of Labour of the Slovak republic that recently presented a proposal of general methodology, but it is still under development. And without relevant data input, it will be difficult to execute effectively.

The efforts to create a comprehensive system on the national level are several and are implemented by various national actors – ministries. The 3 main axes are:

- Ministry of Labour – skills forecasting, methods under development
- Ministry of Education – reform of education system (within that a reform of vocational education system)
- Sectoral ministries – following their sectors and compiling own sectoral analysis

Within the scope of this project, the specific focus is put on Ministry of Transport – Tourism Section – development of the sector of tourism, passing an important Act on Support of Tourism, passing a Strategy of tourism development 2020, launching a big national project National System of Quality of Services in T&H

All these actors compile their own analysis (including consultation with employers' associations, who are obliged by law to conduct their own analysis) and provide data to National Office of Statistics. But the different methodologies and definitions used within the various analyses (often outsourced to various suppliers on the basis of public procurement) make the supplied data difficult to compare.

APPENDIX