

EU.EM.NET Project W.P 2

Country report : Turkey

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5/14/2013

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Characterisation of the T&H sector in Turkey

General description of the sector:

There is no any direct study describing the T&H sectors relationship map. The primary role in the market is the ministry of culture and tourism, controlling, and organising the main actors.

The seasonality in the T&H sector in Turkey is an important issue. Because Turkey has a long and exceptionally attractive coastline plus a suitable climate most of the investments were based on sun & sand tourism. In order to establish a successful example within this model investors choose Mediterranean coast and this creates fluctuation on the numbers of tourists among other regions. Also the less Mediterranean region gets sun the fewer visitors it gets. As a result to this situation employers need fewer employees than fully occupied season and hire their employees only for a part of the year. This situation pushes some employees to look for other jobs and some they don't turn back to T&H sector again. Also the rate of employment of graduates of vocational educational schools in T&H sector is quite low. As another problem the supply and demand doesn't meet because of the different expectations of employers and different skills of employees. For the T&H sector in Turkey also it could be said that diversification is not an adopted fact. Diversified field like spa-wellness tourism is just getting spread. Lastly for T&H sector in Turkey there is no skill anticipation.

The key actors in the T&H sector in Turkey are mainly:

- Public Bodies: Ministries (Ministry of Foreign Affairs, Ministry of Culture and Tourism, Department of Transportation etc.) and provincial bodies (23 development agencies), Municipalities (2950), Universities, all types of schools (51 vocational T&H schools), etc.
- NGO's: Confederations (Turkish Confederation of Employer Associations, Confederation of Turkish Trade Unions etc.), Federations (Turkish Hoteliers Federation, Cooks and Chefs Federation of Turkey, Federation of the Catering Industry Employers in Turkey etc.), Associations (Touristic Hotels & Investors Association etc.), Unions (Union of Hotel, Restaurant and Entertainment Facility Workers of Turkey), Chambers of Trades and Industries (Istanbul Chamber of Industry, Istanbul Chamber of Commerce etc.)
- Private Companies: Travel Agencies (6924), Hotels, Motels, Catering Companies, etc.

In Turkey employers are organized in branch associations such like Turkish Food&Beverage Industry Employers Association etc.

Source: http://www.tursab.org.tr/tr/istatistikler/turistik-tesis-ve-isletmeler/seyahat-acentalari_915.html

The sector can be divided in 5 main domains:

- Accommodation,
- Entertainment services,
- Transportation,

- Education
- Regulators and/or influencers like Government & Guilds

There are more than 300 vocational guilds in various fields. But to sum up the most effective players of the T&H sector are:

- Accommodation service providers: such as Hotels, Motels and all special categories. :
 - o Accommodation market guilds: 100+ federations, association etc.
 - o TUOFED: Turkish Hoteliers Federation (7 regional member federations)
 - o TUROB :Touristic Hotels & Investors Association
- Entertainment service providers: food and dining.
 - o YESİDEF (Turkish Food Industrialists Associations Federation)
 - o Entertainment market guilds:
- Transportation Service providers:
 - o AIR; Local or with Turkish partner Air Lines (25+ Airlines)
 - o http://www.e-yasamrehberi.com/seyahat-rehberi/havayolu_sirketleri.htm
 - o BUS; 100+ Coach Companies <http://www.otobusfirmalari.info/>
 - o Transportation market guilds: TOFED : Türkiye Otobüsçüler federasyonu (Coacher federation of Turkey)
 - o TRAIN, Train Transportation (government controlled, ministry of transportation) : TCDD: <http://www.tcdd.gov.tr/>
- TUYED association of Tourism writers and journalists: www.tuyed.org.tr
- TUREB (Federation of Turkish Tourist Guide Associations): The tourist guide guilds and associations gathered under TUREB are many and can be found on :
 - o <http://www.tureb.net/index.php/english>
 - o <http://www.tureb.org.tr>
- TYD Turkish Tourism investors association: www.ttyd.org.tr
- Turkish Guides www.turkishguides.org
- Türkiye Seyahat Acentaları Birliği www.tursab.org.tr
- MTEGM national vocational and technical education general management <http://mtegm.meb.gov.tr/>
- MEB TTOGM national education ministry trade and tourism education general management <http://ttogm.meb.gov.tr/>

Main figures of the sector can be summarized as follow:

Number of Tourism Licenced Accommodation Establishments 2012

Tourism Investment Licenced			Tourism Operation Licenced		
Number of Establishments	Number of Rooms	Number of Beds	Number of Establishments	Number of Rooms	Number of Beds
960	126 592	273 877	2 870	336 447	706 019

Source: <http://www.ktbyatirimisletmeler.gov.tr/TR,9860/turizm-belgeli-tesisler.html>

Republic Of Turkey the Ministry of Culture and Tourism General Directorate of Investment and Business (31.12.2012)

Number of Tourism Licenced Accommodation Establishments by Types and Classes

Type	Class	Tourism Investment Licenced			Tourism Operation Licenced		
		Nb of Establishments	Nb of Rooms	Nb of Beds	Nb of Establishments	Nb of Rooms	Nb of Beds
	5 Stars	168	44 920	96 402	398	128 289	272 777
	4 Stars	263	37 298	78 806	596	86 940	179 585

Hotels	3 Stars	269	16 463	33 405	728	46 329	94 134
	2 Stars	28	1 487	3 036	484	18 595	36 673
	1 Star	19	479	958	57	2 154	4 199
	Total	747	100 647	212 607	2 263	282 307	587 368
Motels	1st Class				1	13	25
	2nd Class				4	120	237
	Motel	2	29	60	8	234	469
	Total	2	29	60	13	367	731
Holiday Villages	1st Class (5 Stars)	20	4 904	10 839	65	24 264	53 740
	2nd Class (4 Stars)	16	3 502	8 190	16	3 504	7 145
	Total	36	8 406	19 029	81	27 768	60 885
Thermal Hotels	5 Stars	10	2 444	5 602	21	5 246	11 340
	4 Stars	9	1 162	2 838	14	1 916	4 055
	3 Stars	5	291	606	15	852	1 753
	2 Stars				1	34	68
	Total	24	3 897	9 046	51	8 048	17 216
Thermal Holiday Villages	5 Stars	1	129	310			
	4 Stars	1	200	638			
	Total	2	329	948			
Boarding		10	228	393	42	597	1 185

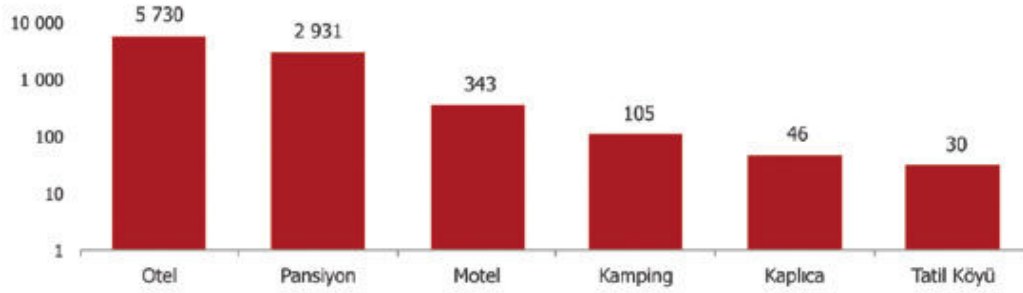
Houses						
Campings	3	239	407	5	266	750
Inns	1	58	120	3	442	942
Apart Hotels	17	2 573	6 738	105	5 248	12 523
Special Establishments	14	400	853	239	7 901	16 889
Golf Facilities with Accommodation	1	60	228	2	201	424
Training and Practice Establishments						
Tourism Complex	9	5 919	14 156	1	518	1 100
Boutique Hotel	84	3 102	6 347	57	2 232	4 544
B Type Holiday Site	3	583	2 702	2	249	860
Boutique Holiday Villa				1	68	136
Mountain House	1	16	32	2	98	272
Ranch / Village House	4	51	101	2	14	28
Mountain Pasture House	2	55	110			
Hostel				1	123	166
T o t a l	960	126 592	273 877	2 870	336 447	706 019

Source: <http://www.ktbyatirimisletmeler.gov.tr/TR,9860/turizm-belgeli-tesisler.html>

Republic Of Turkey the Ministry of Culture and Tourism General Directorate of Investment and Business

Source: Ministry of Culture and Tourism web site www.kultur.gov.tr

Municipality Licenced Facilities throughout Turkey 2010
** Hotels – Pansions – Motels – Camping – Thermal Facilities – Holiday Villages



Source: "Hotel market report 2012" İstanbul GayrimenkulDeğerlemeveDanışmanlık A.Ş. (İGD) info@igd.com.tr

Municipality Licensed Accommodation Establishments by Types- 2006

Type of Establishments	Nb of Establishments	Nb of Rooms	Nb of Beds
Hotel	4 534	132 624	293 808
Motel	308	6 297	15 045
Boarding House	2 081	28 063	67 980
Holiday Village	23	2 202	6 406
Camping	54	2 425	6 839
Thermal Resort	33	2 021	5 593
Total	7 033	173 632	395 671

Source: <http://www.ktbyatirimisletmeler.gov.tr/TR,9861/belediye-belgeli-tesis-envanteri.html>

Republic Of Turkey the Ministry of Culture and Tourism General Directorate of Investment and Business

Number of Tourism Licenced Dining Facilities(31.12.2012)

Type and Class of Facilities	Tourism Investment Licenced		Tourism Operation Licenced	
	Number of Facilities	Capacity (Person)	Number of Facilities	Capacity (Person)
Restaurants	30	13 162	488	160 398
Lux Restaurant			1	600
1 st Class Restaurant	28	13 022	383	142 901
2 nd Class Restarurant	2	140	104	16 897
Restaurant - Shop				
Cafeterias			8	955
Cafeteria-Shop			1	150
Special Facilities			261	67 012
Facility for Daily Use	20	10 678	56	19 110
Floating Establishments	1	405	27	11 886
Theme Park	1	7 000		
Service Station and Restaurants			17	10 815

Mechanical Facilities of Winter Sports & Skiing Centers	3	845		
T o t a l	55	32 090	858	270 326

Source: <http://www.ktbyatirimisletmeler.gov.tr/>

Republic Of Turkey the Ministry of Culture and Tourism General Directorate of Investment and Business

Number of Tourism Licenced Entertainment Facilities
(31.12.2012)

Type of Facilities	Tourism Investment Licenced		Tourism Operation Licenced	
	Number of Facilities	Capacity (Person)	Number of Facilities	Capacity (Person)
Entertainment Facilities			49	8286
Entertainment Centre	3	2 000		
Special Facilities			4	630
Bars			9	935
T o t a l	3	2 000	62	9851

Source: <http://www.ktbyatirimisletmeler.gov.tr/>

Republic Of Turkey the Ministry of Culture and Tourism General Directorate of Investment and Business

Type Of Facilities	Number Of Facilities
Anatolian Vocational High School of Tourism and Hospitality	49
Private Anatolian Vocational High School of Tourism and Hospitality	2
Total	51

Source: Education platform <http://www.egitimnerede.com/>

Inform / Promote / attract

Promotion and marketing around the T&H sector in Turkey

Promoting T&H sector is not a direct activity of neither the government, nor of any ministry. Also high youth population is also creating a huge demand for jobs in all sectors including T&H. Such atmosphere holds companies to demand or act promotion exercises.

But on the other hand, rather than promoting T&H companies tend to choose the best students within the educated youth pool. The need for quality service, brings the need of well-educated employees and that pushes top brands of the market to sponsor for various activities such as fairs, career days and 250+ competitions both local and international that focusing all T&H sub-topics such as Gastronomy, food preparation, bar & entertainment services etc.¹

In education system students are being asked for their desired jobs after 9.th grade (14 years of age), at the schools by their advisor teachers and/or guidance counselors. This is done independently from any influence of a specific sector.

There is also government's indirect support, not targeted directly the T&H sector or the employees but they support companies who hire a young employee for his/hers first job by not taxing the company for the aforementioned employee for some time (generally a year). Turkish government is supporting enterprises and entrepreneurs for lowering the unemployment rate in a gradually increasing fashion within last years.

As a result, there is not a very well structured relationship for potential employees however there are limited promotion efforts which concentrate to do it are shown below:

- By formal education programs which are available on high school and university level (the quality of vocational education in Turkey can be discussed)
- By providing vocational guidance and consultancy services to the potential future employees.
- By developing sustainable collaboration between schools, enterprises and social partners.
- By improving the quality of knowledge and skill of potential work force through trainings and non-formal education.
- By certificating the work force based on national and international qualifications to be employed in the T&H sectors.

Benefits of the T&H sector are mainly put forward thanks to the events "fairs and career days". The main target of the event is attracting young well-educated students. Therefore the main emphasize of the events are usually focusing on a good and prosperous career for the young (The importance of being a part of a strong, successful and reliable team). Therefore there are not much job specific marketing activities.

¹*Source: Etiler T&H vocational school management. Technical general manager.

On the other hand in education system of Turkey, schools are modifying and shifting their way of delivering all the vocational topics, including T&H sector by approval of the EU's 2007 regulation of preparation on national occupational standards.

From that point Turkey is working on to shift some certain types of school to be more sector specific. So that students will be selecting the vocational sector that they will be studying on at an earlier phase.

The advantage of high employability in T&H sectors, the possibility of getting suitable position and careers, the opportunities of having a good income, the attractiveness of flexible, adoptable and mobile jobs are emphasized through:

- Promotion and information sharing processes in the secondary schools and universities,
- Guidance through associations, sectorial information sources, public employment services and private employment offices,
- Documentation prepared by such as trade associations, employers' organizations, chambers of commerce's, industries and municipalities,
- Advertisement through TV and the written press.

There are very limited targeted marketing campaigns for T&H sector. There was one sector independent marketing campaign was promoted and held between 2006-2008, which mentions the importance of VET training. The project is still operational and training continues but the marketing campaign is no longer visible.

These educational support activities is being made by KOÇ Group, a Turkish conglomerate has started an initiative in 2006 as (Mesleklisesi, Memleketmeselesi) meaning (Vocational education high schools, county matter) and they started to support more than 250 schools by both sharing their companies practical know-how in that area and by giving scholarships to 10 to 20 most successful students of the school. They achieved 250 schools and 8000 scholarships in 81 province of Turkey.

The T&H side of this campaign is held by DİVAN (a five star hotel belongs to KOC GROUP) is supporting T&H related supports and they reached 9 schools in 9 cities supporting, 95 students in these schools. Besides one of the schools is specialised in cooks and cooking (Bolu-Mengen). The rest are giving general Tourism and Hospitality lessons in general. They are in :

- Ankara-Çankaya T&H school 10 student.
- Antalya-Merkez 10 student.
- Aydın-Didim 10 student.
- Bolu-Mengen 10 student.
- İstanbul-Beşiktaş 15 student.
- Mardin 10 student.
- Mugla 10 student.
- Nevşehir 10 student.
- Sinop 10 student.

<http://www.mesleklisesimemleketmeselesi.com/tr-TR/MLMMNedir/Kapsam>

In order to attract students, private schools are running some marketing campaign, such as MSA <http://www.msa.com.tr/anasayfa.aspx> having also good relations with private firms. Some public universities as Akdeniz University in Antalya organize also career fair days as such but not to be considered as a real marketing effort.

As a conclusion, when they exist, marketing campaign mainly put forward benefits such as:

- Incentives
- Transferable skills that can be acquired through employment in the T&H sector
- Career paths promotion (from entry-level positions to management jobs)
- Non-Monetary benefits of working in the T&H sector

In the future, no real information is available on marketing campaign in the T&H sector. It seems that TURSAB as a project and is expecting funds (information available by the end of June). YESIDEF is also planning to build a vocational school for training students in the sector.

See also: mtegm.gov.tr

Promotion is also made via contest organisation at regional, national and European level:

Turkey is one of 16 founder countries of The AEHT, which is an International Non-Governmental Organisation (NGO) enjoying consultative status with the Council of Europe. The prime objective of the association is to promote a European outlook among Hotel and Tourism Schools. Their 2013 program is as follows. Every year many different competitions and contest are being held.

- **FEBRUARY:**
 - o February 24th – 26th , Golden Trophy of Catering, Montichiari-Brescia (IT)
- **MARCH:**
 - o March 13th – 14th , Competition 'Il piattoverde 2013 – the waking up herbs', RioloTerme (IT)
- **APRIL:**
 - o April 3rd – 5th , 8th Bartender G&T Competition 2013, Bled (SI)
 - o April 8th – 14th , AEHT Youth Parliament on 'reducing carbon footprints – how can today's tourism services contribute to environmental protection Kópavogur (IS)
 - o April 10th – 12th , 'Favours & Cinéma, Algarve'13, Faro (PT)
 - o April 15th – 18th , 15th edition of the BartolomeoScappi International Competition, Castel San PietroTerme (IT)
 - o April 17th – 20th , 1st Fish & Cooking Aveiro Festival, Aveiro (PT)
 - o April 18th – 21nd , Seminar for teachers and directors on Hospitality and Tourism Management (EQF level 5 and up), Podebrady/Prague (CZ)
- **MAY:**
 - o May 2nd – 5th , 7th International Competition for Employees at the hotel reception *Donna Dina Migliori*, the 5th International Competition Tourism in the City and seminar : 'The Abruzzo region: from a movie set to a tourism region' , Giulianova (IT)

- May 9th – 12th, Seminar for headmasters and teachers on ‘The increasing importance of having qualified people in Catering and Restaurant Sector’ organized by Docklands Academy, London (UK)
- **NOVEMBER:**
 - November 10th – 15th, 25th AEHT Annual Conference, Costa Luminosa Cruise, Savona – Barcelona – Palma – Ajaccio – Marseille – Savona (I-E-F)
- **DECEMBER:**
 - December (2nd week), 22nd Christmas in Europe, Marseille (F)

In addition some additional contests are also organised at regional and national level, such as:

- International Istanbul Gastronomy Festival
- Turkey Creative Bartenders Competition
- Art of Service Golden Corkscrew Competition
- National Young Cook Competition

At primary school level there are limited studies towards to promote any sector including T&H sector. These activities are limited with school trips to various facilities, such as some universities, some facilities like a museum, a historical monument, an amusement park like a zoo or least likely a factory of teachers’ choice which is rarely seen.

Some primary schools give cooking classes to inhibit some skills, where children might get inspired. But these actions are not strategically planned in national level.

T&H jobs visibility in Turkey

In Turkey, NOS preparation is based on the EQRL (1-8).The preparation process is on-going in many sectors and T&H. Until now 34 NOS and 6 NQ are finished in T&H sector at 2-6 level and VET education and training modules for each jobs are based on the NQ competencies .There are some accepted and announced NOS for T&H sectors are shown below. Also some drafts could be found on the link.

<http://www.myk.gov.tr/index.php/tr/taslak-meslek-standartlar>

- Housekeeper level 5,
- Assistant Housekeeper level 4,
- Floor Supervisor level 3,
- Public Area Supervisor level 3,
- Room Attendant level 2,
- Houseman level 2,
- F&B Manager level 6,
- Bartender level 4,
- Service Manager level 5,
- Serviceman level 2/3/4,
- Front desk attendant level 4,
- Front desk manager level 5,

- Hotel reservation officer level 3,
- Hotel phone operator level 3,
- Luggage attendant level 2,
- Door attendant level 2,
- Kitchen Manager level 5,
- Cook level 3/4,
- Pastry cook level 3,
- Kitchen attendant level 2,
- Scullery attendant level 2.

<http://www.myk.gov.tr/index.php/component/content/article/429>

These job roles described by National Qualification Institution of Turkey are started to be used by official authorities (e.g. Ministry of National Education, Ministry of Tourism, and Turkish Employment Institution), employers, companies and other NGOs. It is slightly a new approach and because the obligation for the process is quite new in practice most of the time these roles are used by big multinational companies if they don't use their own described job roles. As there are already described job roles, there are still some drafts to be accepted.

Also NOS and NQ are slightly started to be used in VET curriculums, VOC-Test centers, certifications, accreditation for schools, employments and job descriptions of employees in enterprises etc.

On the site <http://ttogm.meb.gov.tr>, some other job roles are also available, but not described in terms of competences:

- **FOOD & BEVERAGE SERVICES**
 - o Kitchen
 - o Service
 - o Bar
 - o Bakery
 - o Host/Hostess (Plane, Trane and Bus)
- **ACCOMMODATION AND TRAVEL SERVICES**
 - o Front Desk
 - o Floor Services
 - o Reservation
 - o Operations
- **ENTERTAINMENT SERVICES**
 - o Animation Services
 - o Youth Animation
- **FOOD TECHNOLOGY**
 - o Food Control
 - o Milk Processing
 - o Vegetables and Fruit Processing

- Cereal Processing
- Olive Processing
- Tea Production and Processing
- BEAUTY AND HAIR CARE SERVICES
 - Hair Care
 - Beauty Services
 - Body Care and Massage
- SICKNESS NURSING AND GERIATRIC CARE SERVICES
 - Geriatric Care
 - Sickness Care
 - Disabled Care
- MARITIME
 - Boat Captainship

In addition, in small companies, employers can't rely on self-defined jobs. But the higher the role gets the description of the positions is also becoming more defined and more similar to international level definitions.

For example : at low budget, small hotels and pensionsthroughout Turkey, hotel front desk personnel has many jobs, from welcoming to housekeeping, reservation services to room services, even accounting activities and sometimes even purchasing. This way of working and so the definitions of the roles changing completely and becoming more universal and internationally defined roles as the size of the hotel, number of their customers changes.

Some career paths are defined in:

- T&H's Industrial Food preparation side has this main path which works %80 of the time:
 - Starting with **Cook apprentice > Cook > 2.Cook > Chef Cook > Regional Manager > Director** (director position is in charge with more than 50.000 people's meals Daily)
- Hotels most of the time the flow goes like:
 - **Busboy > chief busboy > waiter/waitress > chief-waiter/waitress > restaurant manager > Food & Beverage Manager > assistant GM > General Manager.**

In addition, in most respected business enterprises the performance reviews take place every 6 months or yearly. Depending on the performance these steps can sometimes be passed quickly.

There is also needless to say that depending on the education level of the new applicant to an enterprise, person could start from an appropriate level to their education but internal educations always take place to help to adjust the person to company regulations.

Concerning **qualifications**, T&H sector is considered to be a reactive sector rather than proactive. It was said that unless the demand of customer, is not present for any change than jobs and functions also remains same.

According to technological developments there is a need of new competences such as

- using technology : for Using PDA to take orders or using computer software for reservation or internet sales are on the rise so experienced internet sales experts will be needed more
- Need of language competence is still an up to date issue however as a result of visitors' changing profiles diversified language competences are getting more necessary.
- At the same time diversification is being needed for the competence of working on halal food and kosher food.
- Marketing of T&H the social media experts are needed more than ever.

There is also Fairs and trade shows are taking place more than ever as the globalization and competition is on the rise. So business hotels or 3 day stay culture is rising. Business stay experts will be needed more.

There are also new tendencies in customers, such as organic sensitive tourism, gays, eco travelers, sports fans, etc. they all need new competences.

On the industrial side of T&H also job safety, facility safety and service safety (food, beverage, etc.) is becoming more important and needs new experts.

Main **associations** in the sector are:

- Association of the Turkish Travel Agencies
- TUROFED : Turkish Hoteliers Federation(7 regional member federations)
- Federation of Food Nutritionist Associations of Turkey
- Turkish Tourism Investors Association
- TYD : Federation of Turkish Tourist Guide Associations; www.ttyd.org.tr
- Turkish Hotels Federation
- TUROB : Touristic Hotels and Investors Association
- Turkish Restaurant &Entertainment Association
- The Turkish Foundation for Combating Soil Erosion, for Reforestation and the Protection of Natural Habitats
- Foundation of Turkish Environment Education
- Foundation for the Promotion and the Protection of the Environment and Cultural Heritage
- Grand Bazaar Tradesmen Association
- The Turkish Foundation for the Protection of Monuments, Environment and Tourism Values
- Road Traffic and Road Safety Research Associations
- Develop/Train Workforce - Existing trainings and levels
- YESİDEF : Turkish Food Industrialists Associations Federation): www.yesidef.com
- TUYED : association of Tourism writers and journalists: www.tuyed.org.tr
- TUREB : Federation of Turkish Tourist Guide Associations; The tourist guide guilds and associations gathered under TUREB are many and can be found on <http://www.tureb.net/index.php/english> and <http://www.tureb.org.tr>
- Turkish Guides; www.turkishguides.org
- TürkiyeSeyahatAcentalarıBirliği; www.tursab.org.tr

- MTEGM national vocational and technical education general management;
<http://mtegm.meb.gov.tr/>
- MEB TTOGM national education ministry trade and tourism education general management;
<http://ttogm.meb.gov.tr/>

Develop and Train Workforce

Existing training and qualification levels in Turkey

%3 - 0 : Less than primary education

%13 - 1 : Primary education

%15 - 2 : Lower secondary education

%15 - General

%0 - Vocational

%39 - 3 : Upper secondary education

%25 - General

%14 - Vocational

%12 - 4 : Post-secondary non-tertiary education

%3 - General

%10 - Vocational

%6 - 5 : Short-cycle tertiary education

- General

- Vocational

%8 - 6 : Bachelor's or equivalent level

- Academic

- Professional

%2 - 7 : Master's or equivalent level

- Academic

- Professional

%1 - 8 : Doctoral or equivalent level

- Academic

- Professional

%1 - 9 Not elsewhere classified

Source: Numbers are approximate and only reflects the results of an interview with the 2 big private T&H groups (Dedeman and Sardunya) employing over 5000+ employees in market and a T&H VET school management (Mr.KazımŞener), educating students and supplying sector with 150+ graduates a year for more than 25 years.

In 2007, Turkey created Turkey Tourism Strategy 2023 within this managerial and supervisory skills in T&H sectors were considered important and continuous targets. Total quality management, team work, self-development and innovation topics were also underlined within the Turkey Tourism Strategy 2023.

The trainers and teachers will start to use evaluate their students skills through performance criteria. Also managerial and supervisory skills have been included into the formal and non-formal curriculum in 2006. In recent years, employees who have managerial and supervisory skills are paid more than others.

Source: Turkey Tourism Strategy 2023 <http://www.kulturturizm.gov.tr/genel/text/eng/TST2023.pdf>

In recent years, according to the growth of businesses and the need of standardization of employees during Turkey's negotiations for EU membership the need to ensure the quality and continuation of education and trainings increased. Occupational qualifications of employees in the sector were led by the need to make the appropriate competencies from national and international level. Also the determination of qualifications and competencies changed the needs of educational programs. Sociology of tourism, world cuisines and cultures, Anatolian civilizations and cultures, research methods in tourism, behavioural sciences, new services and kinds of tourism researches, branching trainings are some of the new subject which will be implemented in vocational schools and universities according to Turkey Tourism Strategy 2023.

According to private T&H sector corporations and educational institutions vocational training is a must anymore. Customer expectations are high, competition is fierce, and internal educations of corporations are far from fulfilling the needs.

Internal educations are necessary and valid for company culture and specific topics.

But in more common topics, corporations value and regard employees with certificate level trainings.

Some topic examples are:

- Management trainings,
- Finance trainings,
- Communication, Decision making, Time management
- Business health and security,
- etc.

These changes are basically identified on the customers' needs. But, with the rising demand and competition, corporations started to listen customers more than ever before. The customers showed corporations what needs to be done. Then followed internal educations, more specifically trained employees and finally need for vocational training become inevitable.

Now some more formal approaches are emerging such as:

- Occupational analyses and job descriptions are identified in the H&T sector with social partners and employers.
- National Occupational Standards and National Qualifications are described and published.
- Modular based formal and non- formal curriculums are prepared and implemented

Quality and certification in Turkey

The work experience of the tourism occupations in high school is credited by total hours and it is not transferred as ECVET credit transfer system. The process is still going on.

Reviewing the content of the Tourism Essentials Certification is still an ongoing process in Turkey according to NQ of occupations. The Turkish National Qualification Framework (TYÇ) and integration of the EQARVET studies continue in the Turkish NQA(MYK, www.myk.gov.tr). Some non-formal level 2, 3 and high school level 4 curriculums are based on the accepted NQ for the expansion and strengthening of tourism education in Turkish high schools. Quality indicators are prepared by Ministry of National Education with social partners, employers and NGOs.

There are some partnerships and project based studies for certification, EQAVET and ECVET with the EU countries through NGOs from UK, Ireland, Germany and Netherlands in the T&H sector.

In order to strengthen and improve the quality of VET, modernize VET institutions, improve and develop HR through VET implemented projects some activities such as: expert exchanges, consultancy, modular program development studies, teacher trainings and similar studies has done by the Ministry of National Education. For the Strengthening Vocational Qualifications Authority and the National Qualifications System in Turkey project of NQA, cooperation and studies done with EU countries.

In order to encourage the use of credential recognition different actions are taken such as:

- Preparation of the NOS, NQ, ECVET, ECTS, TQF, adaptation of EQAVET and National qualification based on testing and certification for all level (1-8) occupations in T&H sector.
- Accreditation of the T&H schools and training centers,
- Development of a new VET curriculum for T&H sectorial needs and improving the training and education quality according to EU qualifications,
- Providing equivalence and transparencies of the learning outcomes according to EU qualifications.

Some collaboration can be identified between industry and academic such as:

- Some universities are opening cooking schools by the name and support of some private market companies.
- Trade organizations are opening various courses for individuals and professionals with the support of their member companies. These activities are mostly free or with a reasonable fee.

Strengths of these collaborations:

- Employers are willing and giving support to all studies such as NOS, NQ, Testing and Certification,
- In T&H sector employers and NGOs are aware of arising new skills and want to collaborate with schools and policymakers on the local and national level,

- Sector wants qualified work force and also recognizes the certification of the qualifications,
- Increased number of enterprises, variety of jobs and the need of qualified work force

Weaknesses of these collaborations:

- There are not enough qualified people both in businesses and academic institutions.
- There is not a Testing and Certification Centre which belongs to the employers in T&H sector.
- NOS, NQ, TQF and adaptation of EQAVET are not yet completed for all level 1-8 occupations in T&H sector.
- Educational system is still traditional and because of it internships are seen as obligations to be completed instead of skill improvement processes.
- Collaboration and cooperation activities and studies will be improved among all actors, and some organizations will be established on improving qualification and certification.
- Trained and qualified number of people will be improved in all actors and cooperation will be unavoidable
- Numbers of EU funded Accredited Testing and Certification Centers will be increased and grown up in the countryside,
- Ministry of Culture and Tourism will play a bigger role.

NQF in Turkey

In Turkey, there is a **National Qualification Framework**: Turkish Qualification Framework (TYÇ).

The development of the Turkish Qualifications Framework has been the major success within the framework of the Bologna Implementations in Turkey. An important hallmark of the development of the TQFs is the partnership between the Vocational Qualifications Authority and the Ministry of National Education, the Ministry of Labor and Social Security, and the Council for Higher Education. The process about Turkish Qualification Framework started in April 2006, the framework was approved on January 2010 and application started to take place in December 2010.

Preparation of the Turkish Qualification Framework is still an ongoing process. NQA prepares the TQF with NGOs, universities, schools, employers and specialists. TQF is same as the EQF level.

EQF in Turkey

The TQF was created and will be adapted to EQF in order to integrate European Union's standardization policy through Turkey's membership process. TQF and EQF will be used in testing and certification of the professional skills.

Obstacles for NQF its adoption in Turkey:

- Lack of perceived benefits
- Cost of implementation

- No requirement (e.g. current in-house processes cope adequately)

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

There are no strong partnership examples however since there are mutual benefits between companies and schools, they support each other. Since there are limited number of T&H schools for a Tourism country like Turkey there are not sufficient number of students graduating every year from these schools. And as both local and international companies wants to be the primary option for the students when they graduate, they supply their services and products to support education and win some hearts.

Here are some examples :

- Marsa; a margarin company donates margarin to T&H schools kitchen,
- Hilton and 4 Season hotels; international hotel chains, assign their ballrooms and some food for meetings and various school studies.
- Wine companies, coffee companies, laundry machinery companies, T&H sector software companies, they all support but yet there is no official partnership heard.
- Industrial Practice trainings for students,
- Before the job trainings for students,
- Job and Occupational analysis for NOS and NQ,
- Occupational consultancy and guidance,
- Workforce trainings in schools,
- R&D studies and projects,
- Vocational Service trainings for both teachers and employees.

MEB -national education ministry, Tourism Ministry, TUROB -Touristic Hotels & Investors Association, and TURSAB -Association of Turkish Travel Agencies and some other organizations are in collaboration within each other to plan and design the education system. Yet the only contact point for T&H schools is MEB right now, whom planning to progress with the help of another organization MEGEP -vocational training general management under MEB.

The result oriented private sector administrators are starting to use at least one study at hand, which are internship practices. These are school-enterprises, regional and nationwide collaborations. Enterprises and schools can collaborate and cooperate to develop VET training programs. Educational local authorities, enterprises and NGOs collaborate to develop training programs according to needs of sector and enterprises. It is the best study or education. But these practices sometimes are not paid good attention. Both companies and students tend to complete the exercise for the sake of doing it. Not for the benefits. These practices have to be controlled by the government and schools and should be done more seriously. They believe all parties will benefit from this.

In Turkey all VET curriculums are based on modular programs since 2006 according to the NQ. There are three types of collaborations between industry and education providers. And for the nationwide preparation process of curriculums, education authorizes, NGOs and related field experts work together.

There are some supports proposed in order to increase employers' involvement in employee training and development:

- National and local financial supports and incentives (around 40) to increase the investment of employers for SME's,
- Financial supports to train employers, tax reducing, financial incentives for qualified labor employment, etc.
- National funds for SME's to improve workforce qualifications,
- Financial supports to set up training units for enterprises and NGOs,
- Financial supports through Regional Development Agencies,
- Scholarships in the country and abroad to improve the quality of workforce.

In addition, many companies are building or funding some T&H schools in their regions. For example:

- @MARMARIS İÇMELER, H. NARIN OTEL. Tourism vocational high school
- @Izmir; NevvarSalihışgören, Vocational education campus & high school.
- @ANTALYA – MURATPAŞA; TEZ - TUR Hotel & Tourism vocational high school
- Mermerci family T&H schools, IMKB (Istanbul stock exchange) T&H school, etc.
- Etc. (1/3 of all T&H schools are private funded schools) that is build and run by some private sector families & Companies. Government is also supporting these investors and supporters in some terms of tax reduction.
- KOSGEB -Small and Medium Enterprises development organization of Turkey should also support companies financially to encourage trained young employment. Companies then find motivation to risk and invest and employ new people.

MEGEP -vocational training general management is responsible for designing the curriculum and qualifications. They meet with academicians, associations and related federations and sometimes some private sector representatives to design the trainings.

One interesting example came from these meetings is, few years ago due to private sectors growing investment and growing demand horse riding tourism the need for a professional blacksmith services forced sector to demand for a school, which has opened as a profession under some T&H schools.

Yet in one private market hotel these training designing process takes place a bit different than many others. This company encouraging their employees to take responsibility of a training topic and train his/hers colleagues, they take turns and all students train his friends about some other topic, by doing this they learn better, they ask questions to each other, they listen more, they care more, they respect

each other more and more inter-relations with different sections of the hotel and/or company established. So the company works more affectively after these trainings.

Employers are asked to:

- Offer their experts and qualified workers during the designing of trainings,
- Clarify sectorial and educational need analysis for the curriculum,
- Support qualification indicators of workforce.

Use of technology

The use of technology in training on the T&H sector as many benefits:

- From the Private sector point of view: student with more recent knowledge is easier and cheaper to adapt for the ongoing business. And also there are soft trainings and e-learnings as the technology kicks in. companies love the flexibility of time and place for these high technology aided educations, both company and employee could be more efficient.
- From The schools perspective : with the advantages of new hardware's and software's for T&H sector are highly appreciated. And not by only the hotels but by all three; the schools, private companies and the students where there are less time consumption to adapt to work after graduation.

In general it can be said that it allows:

- Improvement of the quality of trainings,
- Time efficiency,
- Distance education opportunities,
- Facilitation of trainings,
- Providing sustainability and extending to more trainers,
- Leading to individual learning.

Employers' participation in Apprenticeship and training system

- Employers are paid for the trainees' social security payment for apprenticeship,
- High school students have sectorial practices in the season and contribute into workforce in T&H sectors,
- In the apprenticeship system students work 4 days in a week in a company,
- Enterprises which make apprenticeship trainings can benefit from the Regional Development Agencies.

After the transition to Vocational Qualifications Systems, Okan University and TUOFED (Turkish Hoteliers Federation) have reached an agreement for trainings according to decided Qualifications Framework.

Retain workforce in the T&H sector in Turkey

Mature workers encouragement

- involving mature workers in mentoring and training
- Rather than the primary roles, mature workers are preferred in supportive positions, like security chef, internal trainer or training supervisor, internal auditing and/or consultancy positions. There are also some sectors that mature workers are appreciated and more. Positions like seamanship, airplane pilots, machinery etc. are valued even when you are mature.
- Other than being mature there is also a necessity for companies to employ certain number of disabled and ex-condemned people by law. So since companies have an obligation like this, they prefer to have a mature disabled or ex-condemned to be employed, because of low or none performance expectation

Students' attraction

There are jobs called (extra) in the T&H sector. Since these type of employment is so common, the companies demands students for their occasion, directly from school administration. School/teachers do the placements. This way teacher controls students to experience different types of services. One serves as a barmen then practices as waiter/waitress. Some nights and/or some weekends student can choose to work at some parties, weddings, or diners listed at their school. This way students can make quite good pocket money while they add so much to their career.

This happens in the framework of the legal internship period of Vocational Tourism Schools through these steps:

- Giving part time job possibilities to students and making work hours flexible for them
- Giving international scholarship opportunities to good trainees
- Offering employment after training

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

General information

The Main actor is MEB (national education ministry) or MEB's MEGEP -vocational training general managemet they cooperate with private associations, federations, schools and teachers.

Every area of expertise, every topic is being held in different meetings to provide better understanding and development.

In addition some other actors are mobilised such as :

- National, regional, provincial directors and organization (İŞKUR, TÜİK etc.) related with T&H sectors
- Governors, Municipalities and provincial directors and Regional Development Agencies
- Universities and VET schools
- Employers and their NGOs
- Employees in T&H sector

The competition of the private market pushes employers and volunteers to identify and/or anticipate the needs, but employers are not really involved in the process.

Methods used

The Vocational and Technical Education General Management is mainly responsible for these data collecting. The ministry of Tourism and MEB (national education ministry) sends out questionnaires periodically to seize the problems and needs. MEB also opens up Module Update web site where you can suggest or propose new curriculum. Disposal valuation is also another concern of the government so they send questionnaires for them too. There are also price comparison questionnaires by ministry to seize the market pricing trends.

In addition, Employers' Associations prepare surveys and researches to gather the information about the needed qualifications from employer's perspective during whole year.

These analyses focus mainly on current state needs (95%) in order to create a consensus and one voice for decision-making processes.

MEB is responsible for making these assessments. Private universities, schools and training centers are influenced by the assessments in order to be able to promote their studies as employment guarantee studies. Also the more they design their studies according to needs of the employers the more they get close to employers to offer trainings, internships, visits etc. for their students.

Talim Terbiye Kurulu (Former Training and Education Committee) operates under MEB (national education ministry). Cooperates with METEGM -MESLEKI VE TEKNİK EGİTİM GENEL MUDURLUĞU meaning-Vocational and Technical Education General Management. Also cooperates with teachers from T&H schools. This institutions defines the present, investigates the problems with educators then consolidate the offers and presents the next approach or curriculum.

The main advantage of Turkish foundations is that they are really paying attention. They gather together do meetings. But big changes shouldn't be expected. The boards are moving with the trends so they react rather than being proactive. Weakness of the system is also bureaucracy and lack of communication. Some foundations gather but schools are not involved, schools involved this time students and/or private sector not involved. So the main beneficiaries must come together all the time, and different focus groups must come together to share their thought.

Trends in the next 5-10 years

Most and immediate need of the sector and system is education at all levels.

Especially kitchen and service trainings are the most needed.

The increasing demand for bed numbers at hotels and changing behaviour of city people, especially eating out is becoming a necessity rather than a treat activity.

With the growth of dining and accommodations, all related disciplines will need intense training and education (From laundry to kitchen).

Some needs are also identified for:

- Diversified foreign language trainings
- Intercultural relations
- Computer/technology trainings

Main difference between the previous 5-10 years is the way people live, travel, eat and behave. People are travelling faster; their stays are shorter, So you have to squeeze a lot into those small stays. Make sure they enjoy what they do in those small fragments of their time. They demand faster city tours, faster transfers, effective and easy accessible meetings, less luxury but more quality and effective rooms, healthier food, higher hygiene knowledge, faster and effective communication is expected, national and global actions takes place of conventional or traditional actions.

Main evolution of the sector in the coming years

There is an increasing trend of employing foreign workers in Turkey. These workers are mainly from the Ex-Soviet Union countries. The reason for employers to choose foreign workers is the lack of foreign language skills of local workers and connected to entertainment services the artistic skills integrated educational backgrounds of foreign workers.

As the economical and touristic role of the country increasing, the demand for services are getting higher this also nourishes the competition, which requires new technologies, new visions and new approaches.

As the number of visitors increased, the number of facilities (hotels, restaurants, bars, etc) increased. By getting that point service industry tries to differentiate their services and their quality by supporting their team with professionals from all around the world. So the number of employed people is also increasing. Additionally as the market grows while all existing operations are growing new cross-related businesses and new services also evolve which requires even more foreigners.

This Step demands new perspective, which mostly creates additional economic growth, and we create a loop that feeds itself.

Most of the companies and schools believe that promotion of Europe-wide professions will bring a wider perspective on every employee as they meet colleagues from all around Europe. The existing employees understand the company cultures better as they have the chance to learn different values.

Customer expectations will meet better than ever. Local experts will learn from international approaches.

So this is a great way to develop and train all workers at all level and origin. (Improvement of the quality, the possibility of mobilization, the need of standardization and quality).

More **generally**, the government and education institutions are more like following a curriculum plan rather than develop it. But the private sector has to develop themselves along their life, otherwise they fall back So the best organizations to anticipate new skills is private sector. The private sector must be followed and asked periodically to anticipate the trends of the T&H sector. The more human contacting business is the ones with more priority.

Existing best practices in Turkey

In the T&H sector

Two instruments may provide a basis for skill anticipation at the national level. The first one is Turkish Employment Agency (ISKUR) registers; the second one is the monthly labour force survey of Turkstat. Turkish Employment Agency registers contain useful occupational and regional vacancy information for identifying short-term skill needs. ISKUR collects and organizes data from job losers and employers. The register comprises 800 000 entries, one third of the country's unemployed. ISKUR is interested in short-term skill needs so that it can design its active labour market policies and the expected demand for these policies intelligently. Educational attainment and skills are listed. Limitations of the data for forecasting purposes are as follows. The one-year time horizon is the maximum duration of unemployment benefits; unemployment insurance criteria are strict for Turkey where about half of the work force is unregistered, which therefore renders the register a biased sample of the work force; and college graduates typically would not register with ISKUR, registered persons and vacancies would for the most part be blue-collar. However, the data are continuously updated and accessible on the internet ([http:// www.iskur.gov.tr](http://www.iskur.gov.tr)). As first time job seekers start to list themselves more and more, the data will become more reliable for anticipating trends.

The monthly labour force survey of Turkstat remains the only national employment and labour force participation data source. It produces timely labour market data and includes a monthly net income question since 2004. Its strengths are its time horizon that is continuous and current; its national/regional (NUTS 2) level representation with 24 thousand households; and its coverage of all sectors.

Turkey realized its first Youth Employment Summit in November 2008 in the regional industrial province of Çorum, to the northeast of Ankara. The idea was to then let young people come up with a 'road map'. This they did with the participation of a few moderating academics (who were not allowed to state opinions), government officials, NGOs, and social partners. In three of the six independent work groups,

independent nationwide youth organization participants came up with a comprehensive labour demand (vacancy) mapping idea, so that 'local' Turkish Employment Agency (ISKUR) offices or vocational schools could provide training.

As another example of best practises **in skill anticipation in the T&H sector** the project of (MEGEP) (SVET) Strengthening the Vocational Education and Training System could be mentioned. SVET was a five-year project (between the years 2002-2007) resulting from an agreement signed between the European Commission and the Government of Turkey, and had a total budget of € 58.2M. The project aimed at strengthening Turkey's VET system. The project staffs have conducted workshops and studies and held interviews and meetings in a determined effort to gather and understand as much relevant information as they could. The expected final outcome of the project was a strong VET system supported by a National Qualification System with national and international credibility. The specific aims of the project of (MEGEP) (SVET) Strengthening the Vocational Education and Training System were

Creating an infrastructure for the transition to the 12 years primary education,

Increasing the level of standards of the vocational education system to EU and developed countries level

Strengthening vocational education system in the line of social-economic needs and lifelong learning principles.

This approach; was found in order to create an infrastructure for a modern, flexible and high quality vocational education system which can satisfy the needs of labour market and can be integrated with the primary education, secondary education and higher education.

The activities which were developed together with 145 pilot institutions from 30 cities were implemented.

Implemented Activities in Pilot Schools and Institutions

- the purchase of equipment
- the purchase of information technology
- domestic and overseas training of teachers
- domestic and overseas training of managers

In the prepared programs; International Standard Classification of Education (Isced 97) was used.

With the Implementation of the MEGEP project

- In the pilot schools and institutions for the 9th grade the same program was started to be implemented both for general and vocational high schools.
- The duration of education was planned as 4 years.
- 9th grade was planned as promotion and guidance year.
- A suitable infrastructure was created for transition of studies.
- At the end of their studies students started to obtain level 3 certificates with their diplomas.
- Students who drop their studies before graduation became able to obtain level 1 or level 2 certificates.
- In the formal and non-formal vocational and technical education institutions the same modular education programs were started to be implemented in the same fields.
- The modules which were developed within the programs of diploma and certification were started to be used commonly.

Source: <http://svet.meb.gov.tr/indexen.html>

For the last best practise example; as a big actor in the economy, Koç Group has committed itself to taking action on two issues that present an obstacle to the development of Turkey as well as Koç Holding itself:

- High rates of youth unemployment
- Quality issues in the labour market

“Vocational Education: A Crucial Matter for the Nation” was initiated in partnership with VehbiKoç Foundation and the Ministry of Education in 2006. The project aimed to attract young people to vocational education through:

- Building awareness on the importance of vocational education
- Creating a public-private partnerships model for improving vocational education

The Project provides the vocational high school students with scholarships, internships, priority in employment and coaching.

8,000 students from **264 schools** in all of Turkey’s **81 cities** were connected with 21 companies and 350 volunteering employees.

The project will continue, being “exported” to non Koç entities (public-private and third sector) to ensure its sustainability.

Impact

Community benefits

- 68% increase in the number of vocational high school students

- Integration of school-workplace cooperation model of the project into public policy
- Increase in number of public-private partnerships
- Improved popularity of vocational education and the perception of vocational high schools

Business benefits

- Increased awareness for responsible citizenship and volunteering acts among grantees and Group employees
- Increase in reputation and brand awareness of Koç Group, VehbiKoç Foundation, and the project companies

Source: <http://www.bitc.org.uk/our-resources/case-studies/ko%C3%A7-holding-a%C5%9F-turkey-%E2%80%93-vocational-education-crucial-matter-nation>