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FLEXI-TOUR

FLEXIBLE Up-skilling pathways for professionals in the field of Tourism

IO1 – Skills and Competence profile of professionals in the field of tourism. Opportunities and challenges in local tourism development.



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INTRODUCTION

The present desk research is part of the European project “Flexible Up-skilling pathways for professionals in the field of tourism” (2019-1-SK01-KA204-060777), which is a KA2 project in the field of adult education, co-funded by the Erasmus+ programme. More concretely, this report is the activity #1 of IO1 - Skills and Competence profile of professionals in the field of tourism promotion; Opportunities and challenges in local tourism development in the four participating countries and has been drafted by all partners under the guidance of Cluster of Regional Development.

The main aim of this report is to:

- **Identify opportunities and challenges in local tourism development** and identify the existing competence profiles of professionals working in the Tourist industry
- Identify the **gaps and learning needs** with the support of design and collection of interviews and surveys
- **Set the basis** for the design of a tailored training on tourism promotion

In order to collect the information available in this document, partners were requested to answer the following questions:

Please provide the consortium with a brief overview about the Tourism in your country.

Formal/Informal organization structure, % of GDP comes from Tourism, current trends - rising, falling or stagnating? Are there opportunities for professionals in terms of personal development, job stability, remuneration and education? Is the tourism an area, which is worth investing in, in terms of stability, return on investment? Which main activities are suitable for involving new actors – examples: rural tourism, restoration of monuments, hotel services, etc.

Who are the professionals working in the field of tourism?

Here we need to figure out whether we deal only with professionals or even with those who are involved in tourism on a different agenda. When we are considering non-professional, we need to identify who could be involved as an actor in tourism. What



personal development opportunities do these people have? It is possible to make use of a certain official development offer, which is given or every candidate must try to improve it individually. Does it have a chance to capitalize on its contribution to education? What could he/she benefit from?

Is there an official competence profile in your country? If so, which are the key competences? Are competence areas missing?

Is there any official authority in the country that, for example, ensures a certain type of certification of tourism actors in terms of quality, type of activity, personal development, etc.? Is there a systematic support for specific human resources that has a certain sequence, or rather are solutions based on individual needs and current possibilities? Is it possible to test, by means of certain instruments, whether a particular person is suitable for tourism? What are the opportunities of official education or retraining?

The outcomes of this transnational report, together with a questionnaire aimed at identifying the gaps and learning needs will support the professional profile of professionals working in the field of tourism promotion and help in identifying the skill-set needed to draft the contents of the FlexiTour course.

For more information, please visit our project website:
<https://flexitourproject.eu/project/>



GREECE

1.1. Tourism in Greece



Source: <https://unsplash.com/>

Greece (Hellenic Republic) is a country with a rich history, culture and traditions. It's worldwide known for the unique natural beauty, sun, sea and the thousand of islands. It's a European country of 10.74 million population (2018) bordering with Albania, North Macedonia, Bulgaria and Turkey. The climate in Greece is Mediterranean (hot, dry summers alternate with cold, rainy winters) making it supports some of the richest floras and faunas in Europe. Currently, there are [18 UNESCO World Heritage](#)¹ in Greece based on cultural and natural criteria.



[Watch Greece in 4 minutes!](#)

¹ UNESCO. "List of the Heritage in Greece". Visited on: 18 March 2020. Available at: <http://shorturl.at/GR247>

Tourism in Greece started to evolve in the 1950s, based on mass tourism model and the widespread advertising slogan "sun and sea", recognized as the 3S model (sea, sun and sand) features of Mediterranean countries. Tourism is a major contributor to Greek economy and society, and a pillar of rising competitiveness at global level.

In 2018, the **30.9% of GDP²** came from tourism employing 988.600 people, 25.9% of the total employment in the country. Greek tourism compared to the global level has a satisfactory performance conquering the **13th place of the most touristic places³** in the world, reaching 30 million arrivals in 2018, an increase of 3 million from the previous year. Actually, Tourism started to rebounded in 2013, five years after the economic crisis in the country. In this regard, we understand the increasingly important role of the tourism in Greece, affecting ¼ of the total economy and employment.

Nowadays, tourism is still organized and implemented under the frame of the mass tourism. Thus, it's detected the need to adopt alternative methods of tourism in the country. Alternative tourism, first appeared approx. 30 years ago, conducts to adequate and more complete development of the local community contributing to economic growth and prosperity, and increasing the production of the traditional products. In contrast, mass tourism is mainly addressed to consumption of imported products. Cultural, sport and adventure, nature, winter, eco, agro, medical, and religious tourism are the main forms of alternative tourism found in Greece.⁴

At the moment, religious tourism and agro tourism are the most active forms. Religious tourism highlights the Greek monasteries and ancient churches while agro tourism provides the possibility to learn about the agricultural areas, the local products and cuisine respecting environment and traditions. Besides that, innovation and enhancement of adventure, natural, winter and medical tourism are some key trends that starts to raise in the country. To reach this, an innovative tourism product and experiences need to be developed in order to expand the range of different target groups to appealed such us young people who are always looking for something difference and for new experiences, people in the third age who are always willing to learn about history and culture.⁵

² Greek Tourism Confederation (SETE). 2018. "Data for Greek Tourism". Available at: <http://shorturl.at/aciGL>

³ The World Bank. 2018. "International Tourism, number of arrivals – Greece". Available at: <http://shorturl.at/evyA5>

⁴ Western Macedonia University of applied sciences. 2017. "The economic importance of tourism in Greece and in European Union". Department of business administration, division of tourist management. Available at: <http://shorturl.at/invG3>

⁵ University of Patras. 2015. "Forms of alternative tourism". Department of business administration. Available at: <http://shorturl.at/oEHKX>

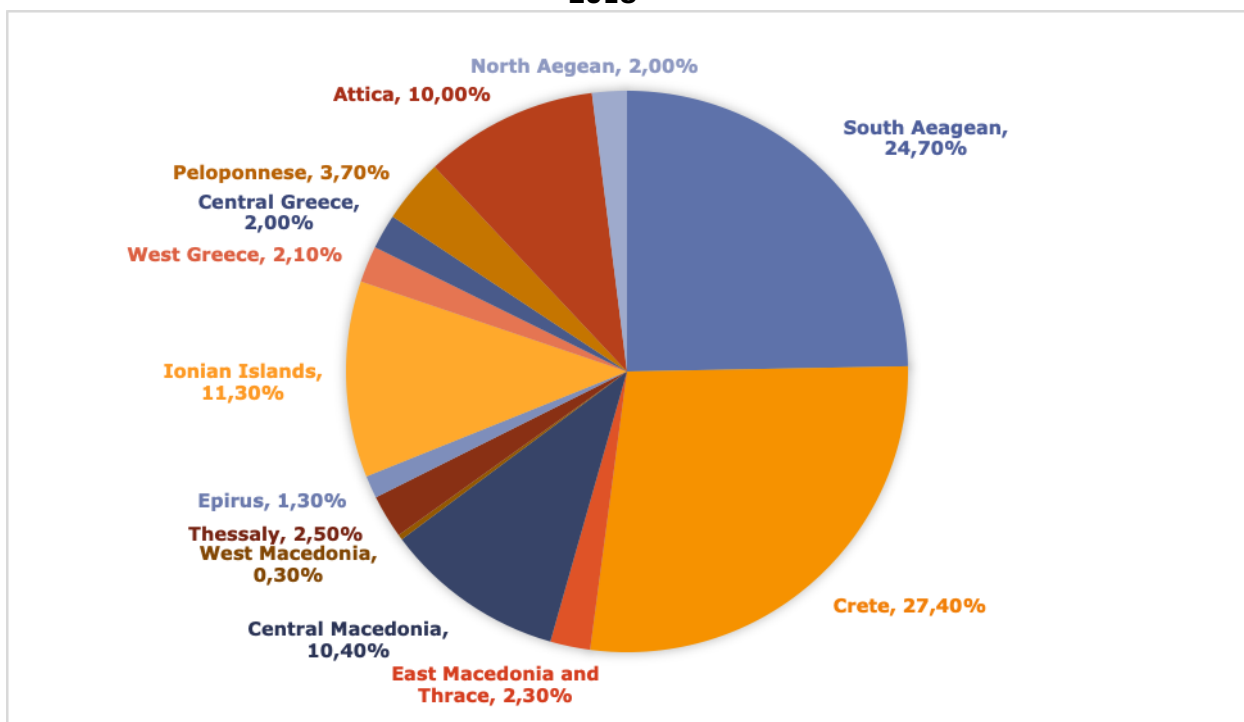


It is worth mentioning the reasons why tourists choose to visit Greece:

- ✓ The rich natural environment
- ✓ The good weather conditions (sun and sea)
- ✓ The number of islands and choices provided
- ✓ The culture and traditions
- ✓ The monuments, ancient places and history
- ✓ The Greek traditional food
- ✓ The Greek 'philoxenia'

Following the ELSTAST report, tourists and Greek inhabitants prefer to travel most to Crete 27.4% and South Aegean islands 24.7% (Mykonos, Santorini, Rhodes, Milos, Naxos etc.), subsequently to Ionian Islands 11.3% (Zakynthos, Corfu, Lefkada, Kefalonia, etc.), central Macedonia 10.4% (Thessaloniki, Chalkidiki, etc.) and Attica 10% (Athens, etc.), and less to Central Greece 2% and West Macedonia 0.3%.

Percentage distribution of nights spent by Greek and foreign nationals in hotels and campsites, 2018



Source: [Hellenic Statistical Authority \(ELSTAT\)](#)

Significant efforts are generally made to develop the tourism in the country. But, is essential to remember that there are many challenges on the way. Development of strategies that enhancing entrepreneurship, innovation and competitiveness of the products, extension of

the touristic period, infrastructure upgrades, new advertising policies, training of professionals and people who work in tourism and strategies for environmental protection need to clearly defined and organized.

1. 2. Professionals working in the field of tourism

VET teachers

VET teachers conduct practical and effective training courses for employees in the tourism sector teaching how to provide work-based training to employees, how to use methods and tools effectively and how to use skills in everyday life.

Tour Operators

Tour operators undertake to carry out all the necessary procedures required in order organize and implement the trip of travelers and tourists. Generally, tour operators buy a range of different tourism services, which they combine into a package and sell them directly or indirectly to various tourists. Tour operators are divided into two categories, the direct sellers (who usually use internet for their tasks) and the traditional tour operators (who sell packages through tourist offices or the country of origin).

Tourism companies

The touristic companies in Greece are active in production, promotion and provision of touristic goods and services, utilizing the productive factors to meet the needs of the tourists and achieve the best possible economic result from its activity. The touristic companies can be categorized based on

- a) the legal form status recognized under the Greek law (sole proprietorship, General partnership, Limited Partnership, Corporation S.A, Limited liability company Ltd, and Private Capital Company P.C.C,
- b) the business activity (production and provision of touristic goods and services)
- c) the business size (small, medium, large)
- d) the satisfaction of the touristic needs (transport, accommodation, catering, entertainment, health restoration, and specialized services companies)
- e) the general activity (if the company meets only one touristic need e.g. as restaurants for nutrition, or if the company meets several touristic needs e.g. an organized hotel can provide restaurant, sport fields, entertainment place and outdoor activities.).

Travel Agents

Travel Agencies in Greece have great experience, organization and expertise in providing with high quality services. Travel agencies communicate with travelers, provide them information, guides, and all the types of tourism.⁶

Business administrative, managers, supervisors and qualified personnel in Tourism

Business administrative, managers, supervisors and qualified personnel who have working experience in the directly involved field of tourism under the Law N. 4276/2014 specifies the new legal framework concerning touristic ventures and establishments. According to the above-mentioned legislation, touristic ventures can be categorized as follows⁷:

Main Touristic Accommodation:

- Hotels
- Integrated Tourist Resorts
- Condo Hotels
- Hotels established in traditional buildings

Secondary Touristic Accommodation:

- Self-catered accommodation – touristic furnished mansions
- Self-catered accommodation – touristic furnished residences

Special Tourist Infrastructure:

- Tourist Ports
- Ski Resorts
- Conference Centers
- Golf Courses

1. 3. Competence profile of tourism professionals

Professionals who provide certification in the tourism sector in Greece

EOPPEP

EOPPEP is the National Organisation for the Certification of Qualifications and Vocational Guidance, an all-encompassing statutory body investing on better quality and more efficient &

⁶ Hellenic Sun editions. Visited at: 16 March 2020. Available at: <http://shorturl.at/qtEW6>

⁷ Charopoulou Ag. "Tourism". Greek Low Digest. Visited at: 17 March 2020. Available at: <http://shorturl.at/bmDFG>



reliable lifelong learning services in Greece. EOPPEP operates under the supervision of the Minister of Education, Research and Religious Affairs and is divided into three national bodies the National Centre for the Accreditation of Lifelong Learning Providers (EKEPIS), the National Organisation for the Certification of Qualifications (EOPP) & the National Centre for Vocational Guidance (EKEP). EOPP is the legal body who provides certification in Tourism specialist jobs such as Tourism Technician.

VET Centers (in Greek named K.E.K)

In Greece, there is a big list of VET centers who provide specialized seminars in Tourism & Service aimed at:

- Young people and young people interested in working in this industry for the first time
- Professionals who are interested in enhancing their knowledge.

The purpose of the vocational training seminar is to acquire the knowledge and skills required to pursue the profession and to prepare trainees for the relevant certification exams. Tourist agents, touristic manager, e-commerce & hospitality sales & marketing staff, entertainment, wellness and sports staff, hotel call center staff, hotel security, hotel receptionist, housekeeper, bartender and waiter/waitress etc, are few examples of specialist jobs provided by VET center. Furthermore, some examples of VET centers are: [KEK Mentor](#), [Master KEK](#), [EKPA KEK](#), [KEK Technopolis](#), [KEK Anaptiksi-Exelixa](#), [KEK KEPETH](#) etc.

TÜV HELLAS

Person's certification is a modern and internationally recognized process by which employees can prove their competence through fair, valid and reliable examinations.

Nowadays where the work environment is fully competitive with rapid industry development and specialization, all workers - practitioners have to demonstrate their excellence – expertise and their professionalism. TÜV HELLAS (TÜV NORD) is a pioneer Certification Body that offers professionals certification (certification of persons) in a wide scope of disciplines such as technology, commerce, administration, tourism, computer science and other.

DQS Hellas

DQS Hellas, through the DQS Tourism Certification Division, addresses companies operating in the tourism sector and meet their needs both in terms of certification of their facilities, equipment, personnel and management methods in accordance with international and European standards. Such as: Hotels, Tour Operators, Travel agencies (national, regional and local), Tourist transfers, Restaurants, Various forms of tourism (winter, rural, medical tourism etc.) etc.



Professionals who provide degree in the tourism sector in Greece

Under the Law n. 4610/2019, is concerned the establishment of synergies between universities (AEI) and technological educational institutes (TEI) in the regions of Central, Eastern and Western Macedonia, Western Greece, the Peloponnese and Crete. Totally, there are 10 departments of Tourism in Greece located in Athens, Thessaloniki, Patra, Spetses, Crete, Rhodes, Lamia, Larissa and in Igoumenitsa⁸, requiring 4 years of study.

In addition, there are also the IEK (Institute of Vocational Training) who provide degree in non-formal education requiring 2 years of study.

Key Competences

In Greece, there is an official competence profile for the professionals in tourism. Tourism is divided in sub expertise each of it requires deferent competences and skills.

Indicatively, we will present an example of set of competence required by touristic agents, based on the NQF⁹ of the EOPPEP - National Organization for the Certification of Qualifications & Vocational guidance.

Competences for touristic agents:

PART 1	COMPETENCES
	Selective attention
	Innovation
	Classification of information
	Competition Speed
	Communication ability
	Logistics ability
	Mathematics reasoning
	Oral understanding
	Writing expression
PART 2	Visualization

⁸ Edu.Klimaka.GR "Department of Tourism". Visited at: 16 March 2020. Available at: <http://shorturl.at/zMS29>

⁹ EOPPEP. "NQF for touristic agents". Visited at 19 March 2020. Available at: https://www.eoppep.gr/images/EP/EP_8.pdf

PART 3	Time allocation
	Innovation
	Synthetic thinking
	Communication ability
	Classification of information
	Written understanding
	Writing expression
	Communication ability
	Listening ability
	Logistics ability
	Deductive Reasoning



1. 4. References

SETE - Greek Tourism Confederation <https://sete.gr/en/who-we-are/brief-history/>

World Economic Forum <https://www.weforum.org/>

Index Mundi (World Data portal) <https://www.indexmundi.com/>

dianeOsis - Research and Policy Institute <https://www.dianeosis.org/>

UNESCO. "List of the Heritage in Greece". Visited on: 18 March 2020. Available at: <http://shorturl.at/GR247>

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SPAIN

2. 1.Tourism in Spain

In terms for its organization structure, in Spain, government departments, such as the Ministry of Industry, Trade and Tourism, formally regulate Tourism. The formal organization structure of this Department divided this Ministry in three different Secretariats of State: the Secretariat of State for Trade, the Secretariat of State for Tourism, the General Secretariat for Industry and SME. Also, there is the sub-secretary of Industry, Trade and Tourism. Regarding the Secretariat of State for Tourism, this is also sub-divided in the following: the Deputy Directorate-General for Tourism Cooperation and Competitiveness; the Deputy Directorate-General for Tourism Development and Sustainability and the Division for Information Analysis and Evaluation of Tourism Policies. There are also other entities, both public and private ones, in charge of regulate the Tourism activities in the country, such as Instituto de Turismo en España (TURESPAÑA).

Tourism in Spain is one of the major contributors to national economy, contributing about 10-11% of the GDP in the country, which means more than €125,500 million. According to Forte (<https://www.statista.com/statistics/640440/travel-tourism-total-gdp-contribution-spain/>): *travel and tourism have become one of the leading engines of growth for the Spanish economy, featuring an ongoing increase in the GDP contribution over the last years and projected to reach approximately 178 billion euros in 2018. Spain ranked second on the World Tourism Organization's list of most visited countries in the world, with its number of international visitors amounting to nearly 82 million in 2017.*

SPAIN IS A LEADER IN HOLIDAY AND LEISURE TOURISM

- ☞ Spain is the 2nd leading tourism brand in the world.
- ☞ It is the 3rd country in terms of number of tourists per year.
- ☞ Spanish airports receive more than 230 million passengers every year.
- ☞ Spanish ports receive 8.6 million cruise passengers every year.
- ☞ The headquarters of the World Tourism Organisation (WTO), the United Nations agency that is the main international tourism institution, is located in Spain.

SPAIN IS A LEADER IN MEETINGS, INCENTIVES, CONFERENCING, AND EVENTS (MICE)

- ☞ Spain is the fourth country in the world in terms of international meetings, according to the ICCA ranking (only surpassed by the United States, Germany, and the United Kingdom)



- ☞ Two Spanish cities are among the Top 5 of the ICCA ranking: Barcelona (3) and Madrid (5) are two of the leading destinations for meetings in the world.
- ☞ In 2018, more than 22,000 meetings, with more than 3.8 million participants, were held in Spain.

Concerning current trends in the field of Tourism in Spain and according to the data collected by the Blog Fergus Expansion, Spain is one of the European and worldwide destinations with the highest number of tourists and revenues. The expenditure made by tourists has reached nearly 90,000 million euros in 2018 (Turespaña, 2019).

TOURIST SEGMENTS

Sustainable tourism: For years now, Spain has opted for sustainable, inclusive tourism, which allows sustained economic growth while preserving the environment and local culture and customs.

Accessible tourism: Over the last 20 years, Spain has developed various programs to enable people with disabilities to enjoy our cultural and natural heritage.

Gastronomy tourism: Every year, Spain receives almost 8 million tourists whose main motivation to travel is gastronomy. Quality, diversity, and innovation are three key factors in Spanish gastronomy.

Cruise tourism: Spain is one of the main cruise destinations in the world. Barcelona is the largest cruise port in Europe, with more than 2.5 million cruise passengers in 2016. 3 other Spanish ports are among the Top 11: Balearic Islands (4), Las Palmas (8), and Santa Cruz de Tenerife (11).

Shopping tourism: Most Spanish cities have large shopping areas and freedom of opening hours (with shops opening on weekends). These range from famous designers' premises, traditional markets, and gourmet shops to department stores and outlets. Spain has produced great fashion designers and international brands, such as Zara, Mango, Custo, Loewe, and Desigual, among many others. The main fashion events include the Mercedes-Benz Fashion Week Madrid, the Barcelona Fashion Week, and the Valencia Fashion Week.

Health tourism: Spain is one of the main health tourism destinations in the world. It is the 6th European destination and the 8th globally. Many old spas and modern health and wellness centers can be found all over Spain, where you can switch off from the daily grind and find yourself again.



Sports tourism: Many international sports events are held in Spain during the year. These events are an excellent opportunity to surprise the participants in corporate meetings and events. These include:

- Football: Regular Spanish Liga and Champions League matches.
- Motorcycling: Three Grand Prix: Jerez de la Frontera (Cádiz), Comunidad Valenciana (Valencia) and MotorLand Aragón (Teruel).
- Formula 1 Spanish Grand Prix (Barcelona).
- Mutua Madrid Open de Tennis.
- Barcelona World Race.
- Sailing – with a coastline of more than 8,000 km, Spain is a haven for sailing and water sport lovers.
- Skiing – 30 ski resorts for alpine skiing, cross-country skiing, and snowboarding. These include Sierra Nevada, the southernmost ski resort in Europe.
- Golf – With more than 500 courses, Spain is the European leader in golf tourism. It offers spectacular courses in natural environments, with the highest quality in services and complementary offerings.

Nature tourism: Spain is the 2nd country in the world in terms of number of UNESCO Biosphere Reserves. It has a network of 45 Biosphere Reserves and 15 National Parks. The European Sustainable Tourism Charter has accredited 30 protected areas. Approximately 30% of the Spanish territory is covered by forestland.

Currently one of the highest trends in the field of Tourism in Spain is the customized of travel experiences; travelers look for planning personal experiences. Especially, there is a trend on weekend trips and ObservaTUR 2018 indicates that there is also a trend on travelers to visit destinations where their impact is not negative, which means being responsible, sustainable and multimodal regarding Tourism.

Information and Communications Technology (ICT) play also a very important role in the field of the Spanish current field of Tourism, according to Booking, projections for 2019 show that it will be a year of full digital transformation for the industry. Travelers enjoy mobile applications that provide real-time solutions, such as real-time tracking of flights or bookings. They also are attracted to applications with Artificial Intelligence and Voice Recognition that help them to know more about their destinations, even long before traveling.



In regards to the main activities involved current and new actors in the field of Tourism in Spain, we have a large list of them, including the following sectors:

- Summer resorts and beaches
- Active and multi adventure tourism (in both, coast and rural areas)
- Cultural tourism
- Business tourism
- Student programs (idiomatic tourism for learning Spanish as a second language as well as other kind of academic exchanges)
- Religious tourism (such as Santiago de Compostela or Holy Week in different cities of the country, especially in the South)
- Festivals and nightlife tourism
- Ski resorts

LABOR MARKET

Regarding the existing opportunities for Tourism professionals in terms of personal development, it needs to be mentioned that Tourism means 13.3% of national labor market in Spain, which means more than 2.5 million of people employed in the Spanish Tourism industry.

According to a research made by IEBS Business School, Tourism is one of the industries, which generate more employment in Spain. Salaries in the Tourism industry in Spain are competitive, and sometimes even higher compared to same qualification professions in other industries. This research also states that Tourism industry salaries in Spain are higher than the European average. Also when it comes to labor opportunities, ICT plays an important role, since as it has been mentioned above, new technologies make this industry change, so it does working profiles. Currently, they exist some professions in the field of Tourisms that did not exist few years ago, such as online sales managers, Big Data experts or community managers.

Obviously, traditional positions in this sector are still a must, such as waitress, receptionist or cooks and chefs, with a higher demand between April and September. Some other positions quite requested are flight attendants, customer service or public relations.



GRAPHIC ANALYSIS



From left to right, the first graphic shows the number of international tourist arrivals in Spain (represented in millions of people). The second graphic shows the touristic spending in millions of euros between 2018 and 2019. Finally, the third graphic shows the number of workers within the touristic sector affiliated to the Social Security until December 2019.

2. 2. Professionals working in the field of tourism

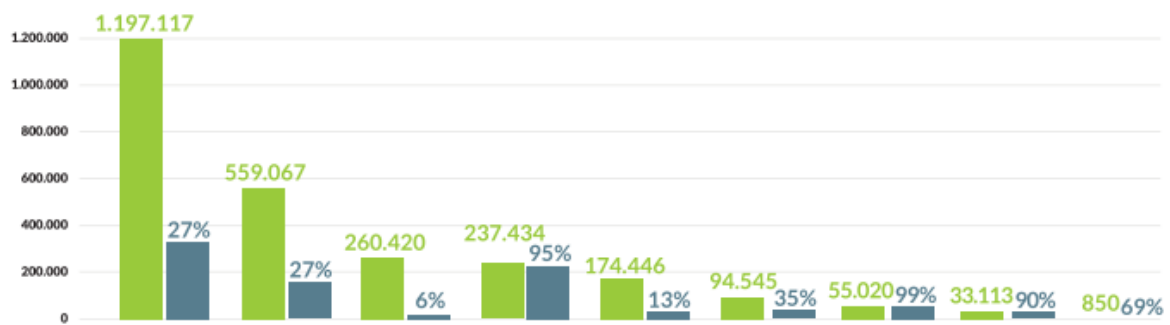
TRADITIONAL ROLES AND PROFESSIONALS IN THE TOURISM INDUSTRY

According to a research about Employment in the Spanish Tourism Industry made by Exceltur (2018), the World Tourism Association includes as branches of the financial activities depending on Tourism all activities with a relevant part of its production depending on expenses made by tourists. That means all activities related to the touristic sector for being in direct contact with tourists. In volume of employment based, the touristic branches are the following ones:

- Food and beverages services (restaurant business)
- Passenger road transport
- Leisure, Sport and Entertainment activities
- Accommodation services
- Activities related to transports

- Car renting business
- Travel agency and tour operators
- Passenger air transport
- Passenger maritime transport

This list of business activities listed above is represented from left to right in the following graphic. Figures in green represents number of workers affiliated in the Spanish Social Security system, figures in blue represents how many of those affiliated in that sector belong to the Tourism industry:



NEW PROFESSIONALS IN THE TOURISM INDUSTRY

Tourism is living a revulsive and changing moment due to the huge quantity and large variety of employment that generates. In addition to the traditional positions in the catering industry and services, Tourism 2.0 is creating higher qualification profiles related to ICT. Some of them are the following:

- **Travel Consultant:** this is a more specialized customer service. This travel consultant communicates directly with customers over the phone, email or chat. Their tasks are offering a quick answer and giving solutions on time, especially when the customer is on desperate situations such as delays, cancellations, etc.
- **Claims Specialist:** those are more senior profiles in the company with more practice solving difficult situations.
- **Learning Training Specialist:** they are leader whose training and knowledge are essential in order to train other travel consultants.
- **Sales/Business Analyst:** this profile is responsible for identifying factors that influence sales and find out reliance between them. It will be needed to use GoodData and BigData in order to give specific ideas, which affect sales decisions. Some other functions they have are: understanding the marking and the technical infrastructure as well as analyzing prices and processes affecting sales performance.
- **Copywriter:** in the era where the content is the key, copywriters are a very requested profile in the new touristic industry. Their aim is to draw users' attention through the different sales channels (emails, messages, apps, blog, etc.).
- **Internal Communications:** every time it is more needed to have internal communication teams that are able to lead business communication channels and transmit new models of business philosophy based on flexibility and dynamism.
- **Javascript o Python Developer:** programming languages developers (especially Javascript or Python) are the most requested profiles in the online touristic sector. The most innovative positions that require these profiles are related with cyber security, electronic signature, smart cards, and means of payment and phone apps. Optimizing search results, integration of new methods of processing payments and improvement of the application-programming interface are also some other duties that this profile carries out.



2. 3. Competence profile of tourism professionals

Until 1963, when it was approved the Royal Decree 2427/1963 by the Ministry of Information and Tourism, there was a legal void that used to be unable to have official studies that allow to train future professionals in positions of responsibility within the Tourism sector companies. Therefore, the companies used to become training centers for their employees, where they were trained along their career in their different positions.

The Royal Decree mentioned above established the Official School of Tourism and considered it as a pattern and stimulus of non-official training of a similar specialty and it will capitalize on curriculum experiences from other countries with a large touristic tradition. This Decree also establishes as “mandatory the legal recognition by the Ministry of Information and Tourism of those non-official touristic training centers whose students aim to validate their studies in the Official School, with the objective of providing their courses with more legal dignity and prestige”.

In 1963 and in the mentioned Decree, it was born the diploma of Touristic Business Technician. The studies in Tourism were officially inaugurated in Spain. The diploma lasted three years, the two first ones for common subjects and the third one for the specialty. This new diploma was born to give an answer to the touristic sector needs where Tourism was not a trend anymore but has become a strategic activity within the Spanish economic sector. In 1980, 15 years after the approval of the curriculum, the Business and Touristic Activities Technical Diploma was released. It was regulated in the Royal Decree 865/1980, April 14th. This new curriculum was planned according to the needs of the sector that required a more detailed training to the business itself.

Taking into consideration precedents and training, Touristic studies have been considered for many years in Spain as insufficient, uncompleted, non-integrated and obsolete. The reason was that the total of the population working in the touristic sector, just few of them used to have specialized training. Moreover, this training was not adapted to the market needs, since it did not include different professional subsectors that are also part of the touristic system.

In terms of training, some experts consider that there is still a **huge room for improvement**, especially when it comes to manager positions.



VET PROGRAMS

VET programs related to Tourism are integrated in the professional group of **Hotel-Catering and Tourism**. Currently, the training programs is offered by the Ministry of Employment through the Certificates of Professional Standards, as well as by the Ministry of Education through the Medium and Higher level VET programs.

Professional Certificates recognized by the Ministry of Employment (1, 2 and 3 EQF) in the field of tourism:

- Basic operations for accommodation
- Accommodation management and cleaning
- Accommodation reception
- Design and management of package tours and events
- Touristic products and services sales
- Local tourist promotion and visitor information
- Rural accommodation

VET courses recognized by the Ministry of Education (4 and 5 EQF) in the field of tourism:

- Accommodation and Laundry Basic Professional Diploma
- Higher Technician in Travel Agencies and Events Management
- Higher Technician in Tourist Accommodation Management
- Higher Technician in Tourist Guide, Information and Assistance

UNIVERSITY

The inclusion of the studies in Tourism into the Spanish University took place very late. Not until 1996, those studies started to be taught at university level in a country where Tourism was (and it is) one of the main sources of wealth. It is remarkable this delay if we compare the situation in other countries where Tourism studies at University level were included much earlier, such as Italy in the twenties or Germany and UK in the thirties).

In Spain, the origin of this training was started in private schools that were monitored, from the public sphere, by the Official Schools of Tourism. All this was developed in a non-university context. It was later, in 1996, when studies in the field of Tourism arrived at University with the Diploma on Tourism. The Organic Law 4/2007, from 12th April, which was modified by the University Organic Law 6/2001, from 21st December, laid the foundations to make a big change in the Spanish Universities. On 26th October 2007, the Council of Ministers approved the Royal Decree of Non-official University Education that modified the classification system of Higher



Education. It established a new structure of degrees in three different levels: Bachelor, Master and PhD according to the European Higher Education Area.

Nowadays, we can affirm that the context of the training in Tourism has improved in Spain. The offer is larger and better adapted to the market needs. It reaches basically all levels and professional profiles. It has become a better integrated system, with a continuous updated on methods and contents.

The academic offer in the Spanish universities can be summarized in the following:

Bachelor's degree (6 EQF):

- Bachelor in Tourism
- Bachelor in Tourist Management
- Bachelor in Tourism and Leisure Management
- Bachelor in Tourism – Tourist organization and resources management
- Bachelor in Tourism and Hospitality Management
- Bachelor in International Tourist Business and Leisure Management

Master's degree (7 EQF):

- University Master in Destinations management and Leisure and Tourism Equipment
- University Master in Tourism, Archaeology and Nature
- University Master in Tourist Destinations Integral Management
- University Master in Administration of Tourist Organizations and Resources (Hotel Management)
- University Master in creation and management of active tourism enterprises.
- University Master in agroecology, rural development and agrotourism
- University Master in Business and Tourist institutions Management and Direction
- University Master in Management of Conferences and Business Tourism
- University Master in Leisure, Culture, Tourism and Sport projects management
- University Master in Communication and Cultural Heritage
- University Master in Inland and Health Tourism Planning and Management
- University Master in International Tourist Direction
- University Master in Hotel Management
- University Master in territorial and environmental strategies within the local context
- University Master in Innovation in Designing for the Tourist sector
- University Master in Tourist, Transport and Environmental Economy
- University Master in Innovation and Tourist Marketing
- Master in E-tourism: Applying Technology To Tourism Management And Sales

PhD programs (8 EQF):

- PhD program in Tourism and Leisure
- PhD program in Tourism
- PhD program in Tourism, Economy and Management
- PhD program in Law, Society and Tourism

NON-REGULAR EDUCATION IN THE FIELD OF TOURISM

Non- regular education basically means occupation vocational training and lifelong learning. The State Employment Public Office and the employment services of the Autonomies, which are focused to unemployed people who aim to the labour integration through a basic qualification to develop a specific role position, manage the first one.

Lifelong learning in Tourism is offered to active professionals within the sector who want to be updated. Usually, there are specialized short courses that cover all tourist business areas.

KEY COMPETENCES AND COMPETENCE AREAS MISSING IN THE FIELD OF TOURISM

The research "La opinión del colectivo empleador sobre la formación de las personas tituladas en Turismo", made by Agency for the Quality of the University System in Catalonia (2019) (http://www.aqu.cat/doc/doc_29832874_1.pdf) highlighted soft and hard skills that should be improved in the field of tourism:.

Soft Skills	
1	Problems resolutions and decisions-making
2	Languages
3	Self-employment
4	Practical training
5	Responsibility at work
6	Ability to create new ideas and solutions
7	Ability for learning and self-learning
8	Teamwork
9	Negotiation skills
10	Leadership
11	Speaking skills
12	Writing skills
13	Use of more used ICT tools
14	Numeracy skills

15	Documentation
16	Theoretical training

This research also states which specific skills people should be improved. Some of the most remarkable ones are the following:

Hard Skills	
1	Ability to work in difficult, intense and unexpected situations
2	Concern about the ongoing improvement of tourist services processes
3	Analytical capacity to interpreter data
4	Analytical capacity to understand behaviors and trends of the sector demand
5	Knowledge of all dimensions of the product/service and the production and sale processes
6	Identification of the potential of a product, a service or a tourist resource
7	Elaboration and analysis of results from the business or tourist activity management
8	Achieving excellence in the relations with the customer of product and tourist service
9	Having an interdisciplinary vision of the sector and the needed financial, social and environmental sustainability
10	Application of the management and administration principles within the organization or tourist activity
11	Ability to understand the Tourism multicultural dimension
12	Understanding the impact of Tourism in its spatial, social, cultural, legal, political, labour and financial dimension
13	Recognition of the main agents participating directly in the tourist market settings

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ITALY

3. 1. Tourism in Italy



Tourism in Italy: flows and trends

Tourism represents a significant sector for Italy, which generates many job opportunities compared to other industrial sectors. Tourism contributes more than **13% to Italy's GDP** (2018 and 2019 data) and represents 14.9% of total employment with 4.2 million employees, which is why Italy is leader in Europe.

Tourism is a growing sector that can offer various employment and self-entrepreneurship opportunities especially for young people. Italy remains in fact one of the favourite destinations worldwide, thanks to the variety and quantity of beauties it can offer: cities with historical and artistic value, museums and archaeological excavations, churches and cathedrals, national parks,

seaside and mountain resorts, lagoons, lakes, spas. It is the country with the highest number of sites (49) included in the list of UNESCO World Heritage Sites.

➤ **2018: a new record year for tourism in Italy**

In 2018, the Italian hospitality establishments, with around 428.8 million presences and 128.1 million arrivals, reached a new historical peak, exceeding the peak already reached in 2017. With a share of 13.6% of the total EU28, Italy is the third country in Europe by number of presences in hospitality establishments, after Spain and France. Compared to the previous year, tourist flows increased by 4.0% in terms of arrivals (almost 5 million more) and 2.0% in terms of presences (8.2 million more nights). The presences are growing for hotel businesses (+1.6%), but especially for non-hotel businesses (+2.7%); the latter recorded a 6.5% increase in arrivals, double the already significant increase in hotel businesses (+3.2%). This consolidates a trend that has seen the weight of non-hotel establishments' increase in terms of both arrivals (from 19.2% in 2008 to 24.5% in 2018) and presences (from 32.6% to 34.8%). The positive trend in domestic tourism demand continues, with an increase in both arrivals (+3.6%) and presences (+1.1%) of customers resident in Italy. A particularly positive trend regards the non-resident component: compared to 2017, arrivals grew by 4.4% and presences by 2.8%; the latter increase especially in the non-hotel sector (+3.6%, compared to +2.3% of hotels).

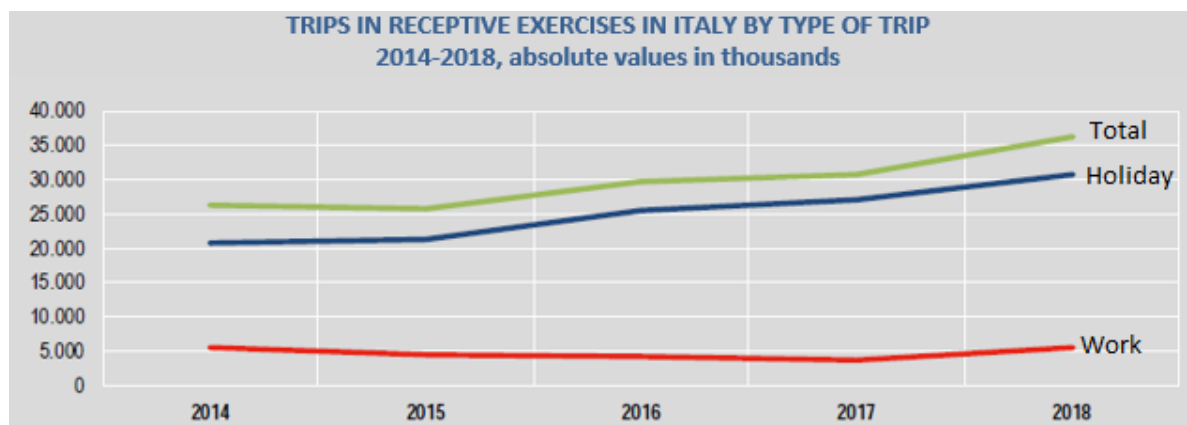
ARRIVALS AND ATTENDANCE BY TYPE OF OPERATION AND CUSTOMER RESIDENCE							
Year 2018							
MOVIMENTO		2018			Variazioni % 2018/2017		
		Esercizi alberghieri	Esercizi extra-alberghieri	Totale	Esercizi alberghieri	Esercizi extra-alberghieri	Totale
Residenti in Italia	Arrivi	49.948.206	14.957.523	64.905.729	+3,1	+5,0	+3,6
	Presenze	140.193.803	72.140.588	212.334.391	+0,8	+1,7	+1,1
Non residenti in Italia	Arrivi	46.824.639	16.370.564	63.195.203	+3,2	+8,0	+4,4
	Presenze	139.276.433	77.234.113	216.510.546	+2,3	+3,6	+2,8
Totale	Arrivi	96.772.845	31.328.087	128.100.932	+3,2	+6,5	+4,0
	Presenze	279.470.236	149.374.701	428.844.937	+1,6	+2,7	+2,0

Source: [Italian National Institute of Statistics \(ISTAT\)](#)

➤ **Travel for business is on the rise**

In 2018 holidays are estimated to represent about 85% of the trips made by residents staying in Italian accommodation establishments (91.0% of nights), an increase of 13.9% compared to the previous year (+8.3% in terms of nights), consolidating the positive trend recorded starting from 2016. Over 90% of holidays spent in hospitality establishments in Italy occur for reasons of rest, pleasure or leisure (+15.3% compared to 2017). The other reasons are residual and include visits to relatives or friends (4.3%), health treatments / spa treatments (2.5%) and religious reasons

(1.8%). Business trips are 15.2% of those spent in hospitality establishments, equal to 9.0% of nights: in 2018, for the first time, they grew markedly (+48.8%), after having recorded an uninterrupted drop in the previous three years.



Source: [Italian National Institute of Statistics \(ISTAT\)](http://www.istat.it)

➤ **About 2019**

According to data processed by [ENIT - National Tourism Agency](http://www.enit.it), even the first data on the balance of tourist flows in 2019 describe a very favorable year: the expenditure of international tourism grows by 6.6% and there is an increase in overnight stays by +4.4%. An increase also noted by the data on airport arrivals that close the first 11 months of 2019 with a +4% of total passengers, which rises to +5.8% on international ones. Among the tourists who visit most of Italy there are still the German-speaking countries (Germany, Austria and Switzerland) which represent 25% of international tourists, but the number of tourists from Russia, the United States and Canada has still risen and from China.

➤ **Tourism in Sicily**

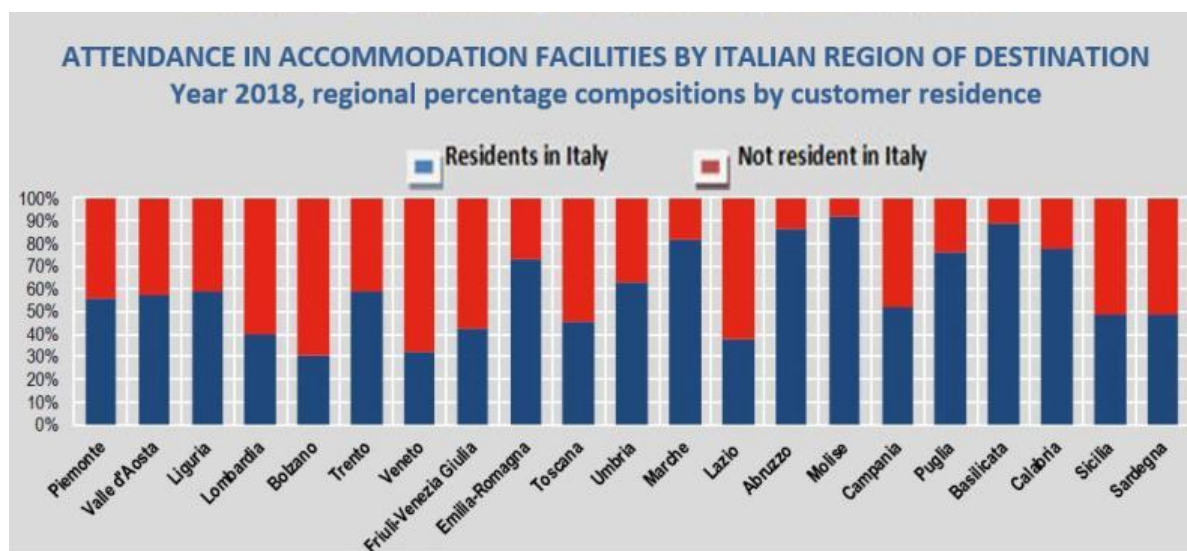


Discover The Beautiful Sicily!

In Sicily, in 2018, there was an increase in tourist flows of 2.9% compared to the previous year both in terms of arrivals (over 140 thousand more) and presences (over 430 thousand overnight stays more), consolidating the recovery that had manifested itself in previous years. The

presences are growing in hotel establishments (+1.5%), but especially in non-hotel establishments (+8.9%). In the latter type of business, the number of arrivals grew by 6.5% and presences reached 3 million (+8.9% on 2017) while one million and 100 thousand arrivals (+6,5%), with an average stay of 2.9 nights. In the hotel establishments, on the other hand, presences are close to 12 million and arrivals settle at over 3 million 800 thousand. On average, the stay in hotels is confirmed as 3.1 nights per customer. Foreign arrivals (2.3 million) account for 46.3% of the total and, although this weight is growing (it was 44.6% in 2017), the domestic component still remains prevalent.

Unfortunately Sicilian presences represent only 3.5% of a national total of 429 million: tenth region of Italy. The tourist potential is enormous and there is still much to be done!



Source: [Italian National Institute of Statistics \(ISTAT\)](https://www.istat.it/it)

The typologies of tourism with a greater perspective

Tourism has changed a lot over the years and being able to count on local resources is no longer a sufficient factor to encourage tourist incoming, if the services and communication skills are not adequate. The ease of movement, the proliferation of low cost solutions, the spread of the web and online services are just some of the elements that have expanded the possibility of travel for many people and increased tourist destinations, giving a strong push to the sector, but forcing it also to evolve to find new solutions to meet this new types of tourism.

- **Sustainable Tourism.** The growing mobilization of large masses of people for tourism purposes can in fact lead to social and environmental consequences in the most delicate territories and habitats; sustainability thus becomes a great creative opportunity to regenerate and qualify the tourist offer and for the development of new professional figures, capable of holding together communication skills, reading skills of the territory

and knowledge related to the carrying capacity of the environment and affected communities.

- **Experiential tourism**, which responds to emotional needs, linked to a narration of the territory based on the specific interests of the recipients (architecture, photography, music, food and wine, etc.). It was born as a response to contrast the pricing policies of large groups and is based on the theming and personalization of tourist routes to offer the customer a unique experience to share with people joined by the same passion.
- **Cultural tourism** is also a great challenge for Italy, being one of the strategic assets for economic growth. The work of the TDLAB (Laboratory for Digital Tourism), an initiative of the Ministry of Cultural Heritage and Activities and Tourism, which had the task of implementing a digital strategy for tourism, was included in this context. The TDLAB elaborated the Strategic Plan for the digitalization of Italian tourism, which considers three areas of intervention -interoperability and big data, digital development and promotion and marketing -, declined in 30 concrete actions. With the Culture and Tourism Decree (Law Decree 31 May 2014, n.83), Italian Minister of Artistic and Cultural Resources (MiBACT) has introduced important innovations for the revitalization of tourism. Among the measures taken: tax credit for the digitalization and for the restructuring of tourism businesses; the definition of "zero bureaucracy" tourist districts, simplifications for new businesses and tax breaks for start-ups created by people under 40. The adoption of an extraordinary plan for cultural tourism mobility, the creation of national circuits of excellence and a review of the classifications of hotel structures to adapt them to European and international, are also expected.

Business opportunities in tourism

Tourism is a strategic driving force for the growth of the Italian economy, allowing the enhancement of other fundamental assets such as agri-food, food and wine, art, culture and historical and landscape heritage.

In Sicily, in particular, the link between these sectors is already deeply rooted, but it is necessary to take a strategic vision and long-term planning to develop an ever-richer offer, in which each supply chain can create added value for the whole system.

We need to continue investing in some fundamental aspects such as innovation, sustainability, organization and internal mobility. In this perspective, investments in training and digitalization are essential to enhance the enormous potential of this area, because only with a "multidimensional" vision of tourism it is possible to improve the economic impact of the tourist stay on the island, acting on the right mix of quality and quantity. Investments could, for example, assist companies in the tourism sector to learn more about their market, provide tools



to verify their positioning on social media, offer support for the search for counterparties through the Digital B2.

The commercial opportunities in the tourism sector are numerous. They could arise, for example, by the construction of a dedicated offer from an experiential perspective (food and wine tours, handcrafted workshops, naturalistic and sports activities) or by the investment in the business trend with conference events, also as a gateway to tourism, aimed at re-launching the image, culture, art and traditions of the territory at national and international level.



Focusing on food and wine excellence can represent another great commercial opportunity, considering that food and wine interests are one of the main reasons for which you choose to visit Italy (it is estimated that the "Made in Italy" agri-food industry moves on its own, 1 tourist every 4). The agri-food sector makes full synergy with tourism and also represents an important lever for seasonal adjustment of flows.

Putting tourism, food and wine, environment and territory into the system is therefore the right recipe for making this sector a real lever for development and employment.

In particular, Sicily is the 5th region in Italy for PDO, PGI and TSG quality food production, in relation to which there are over 16,000 quality producers (8.1% of Italy's quality producers). Great attention is also paid to organic production: Sicily is the first in Italy in terms of area destined for organic crops with over 427 thousand hectares (22.4% of the total in Italy).



On the quality front, the wines of Sicily are confirmed at the top: most of the wine produced in the region is made up of PDO (28%) or PGI (54%) wines. Therefore, there is an excellent performance in terms of economic value generated for the certified wines segment: Sicily, with 550 million, occupies the 4th position, after Veneto, Tuscany and Piedmont.

Some new professional and entrepreneurial activities in tourism sector

In such a growing and evolving sector, highly specialized figures with adequate preparation and training are sought. Among the new profiles sought in the sector stand out the new skills related to the web and social networks/media, the knowledge of languages (better if two), in particular those of the new emerging countries, such as the BRIC (Brazil, Russia, India, China). Traditional figures are always sought; they are the keystone of hospitality and hotels, especially in luxury and business structures. An emerging figure is revenue/pricing, who has the task of changing rates through the management of price and inventory levers, also through online booking services. In addition to employees, other opportunities also open up for new business initiatives:

from booking services that offer tools to the consumer or operator, to apps that use georeferencing to offer value-added content/services, to startups specialized in social marketing and storytelling of places.

The official tourism organizations in Italy

The Local Tourist Systems (STL) introduced for the first time by Law 135/2001, constitute an original model of territorial organization for the enhancement of existing resources and the realization of innovative projects for the development of the tourist offer. The creation of STL is entrusted to the responsibility of the Regions, called to define autonomously the territorial governance strategies. The STL are born on the initiative of local authorities or individual or associated companies, and take shape through the agreement between public and private subjects interested in the tourist development of the territory.

By virtue of its exclusive regulatory power, Sicily has adopted its own autonomous discipline of the Local Tourist Systems with the regional law n.10/2005, which established the Tourist Districts, promoted by public bodies, territorial entities and/or private subjects that intend to contribute to the tourism development of their territory, or of several territories belonging also to different provinces. The Districts could be of a "territorial" type, among territories of contiguous municipalities, or "thematic", among territories of municipalities, even if not contiguous but characterized by the sharing of a single specific theme.

This is a solution that, compared to the elapsed time, today demonstrates suboptimal functionality. Hence its overcoming by the DMO (Destination Management Organization) model, to which the new regional programming cycle 2014-2020 refers. The Regional Tourism, Sports and Entertainment Department has identified seven main themes in the Regional Tourism Divulcation Plans 2016 and 2017, drawn from the most sought-after experiential forms in progress, each of which represents the conceptual area of reference for each of the DMOs to be established:

- 1 DMO - Sicily Culture;
- 2 DMO - Sicily Nature;
- 3 DMO - Sicily Sea;
- 4 DMO - Sicily Food and wine;
- 5 DMO - MICE (Meeting, Incentives, Conferences and Exhibitions);
- 6 DMO - Sicily Wellness;
- 7 DMO Sicily Minor Islands.



Grants for new business

Entrepreneurs who intend to start a business have the opportunity to access various concessions and contributions of a regional, national and community nature. Over the last few years there has been a gradual introduction of conditions aimed at discouraging adventurers and rewarding shipbuilding projects; the necessary documentation has become more and more substantial in relation to the availability and intended use of the property, the availability of licenses (especially for the restaurant business) and the necessary authorizations. In any case, companies that activate low environmental impact production processes aimed at improving the quality of work, are rewarded.

Impact of Covid19 on Tourism– brief notes. Figures if available.

3. 2. Professionals working in the field of tourism

The main tourist professions

The tourism professions provide activities focused on tourism promotion, hospitality, assistance, accompaniment and guide services, in order to offer a complete service to tourists and make them enjoy a pleasant travel experience, also from the point of view of the knowledge of the places visited.

The main traditional tourist professions are:

- The **tourist guide** and the **tour guide** are autonomous figures, who collaborate with tourism companies, which today require skills such as strong specialization in certain territorial areas, narrative and mediation skills, excellent knowledge of at least one foreign language.
- The **naturalistic or environmental excursion guide** accompanies individuals or groups of people in natural environments or areas of interest for environmental education, illustrating their territorial characteristics, environmental and historical-anthropological aspects.
- The **travel agent** is a figure who has the task of completely following the customer's journey, advising him and guiding him in the choice of tourist services.
- The **receptionist** is one of the key figures in the tourism sector: he welcomes the customer into the accommodation, and immediately has the task of putting him at ease and satisfying him.



- The **hotel manager** takes care of the technical and managerial aspect of the accommodation facility, he is a manager who has organizational, managerial and administrative skills.
- The figure of the **tourist entertainer** is required in all accommodation facilities (such as tourist villages, large hotels and cruise ships) in order to entertain guests and make their stay more pleasant and enjoyable.

Non-professional actors in the tourism sector

➤ *Some examples*

The participation of **local communities** represents a tool for sustainable tourism development. It is in fact a valid alternative of destination management, in which the residents contribute to creating the tourism development strategy, rather than suffer the effects.

Residents have a function of fundamental importance, increasingly perceived by the tourist. The traveler has in fact become more demanding in the last decade and is no longer satisfied with the stereotype, but often seeks contact with the natives and their traditions. An increasing number of tourists expect a "real" holiday, in a place not artificially built, but able to reflect its origins and, for this to happen, the support of the local community is needed.

The **Rental With Driver (NCC)** is not simply the alternative to the traditional TAXI, the substantial difference is in the philosophy of the service which, reflecting at best the customer/supplier relationship, creates the basis for the delivery of targeted services, often customized. From the first contacts with the tourist, a dialogue is established, the type of service he needs is identified, within the limits the supplier begins to conform it on the basis of the customer's needs and expectations.

The **Municipalities Tourism Offices** promote the qualification of the local offer system and tourist services, through the enhancement of the cultural, historical, artistic and environmental heritage of the city territory and through the organization, coordination and promotion of projects, events and cultural events, activation of networks with local tour operators. They promote the integrated management between public and private subjects of the promotion and marketing policies of the tourist destination.

The **"Bed & Breakfast"** makes the knowledge of the place direct and more immediate. In fact, the tourist, staying in the structure, has the opportunity to know the area from the point of view of the owner/resident, who provides, compared to the usual offer of a location, interesting less "tourist" but more authentic alternatives. The Bed & Breakfast can represent the ideal interface between the tourist and the territory to seize all the opportunities that the area offers, from concerts to museums, from artwork to the most suggestive views.

➤ ***The possible personal development opportunities***

As for **local communities**, their participation can encourage the creation of initiatives aimed at various economic sectors, such as the promotion of the purchase of local products (food and crafts) by tourists and local businesses. This would lead to the development of new forms of employment for local residents in the tourism sector.

In the **NCC** rental, the driver, with adequate knowledge of the area, could offer an exclusive service, tailored to all the tourist's needs: he can take him on tourist itineraries through the most renowned places, offer him advice on the organization of travel and tourist routes, etc., of course without ever invading the field of qualified professionals (tour operators, tourist guides, etc.).

With regard to the **Municipal Tourism Offices**, public employees, through adequate training, can develop their ability to act professionally with particular attention to the needs of citizens and tourists, and increase professional skills to guarantee the quality of the services provided.

B&B owners can create circuits and associations: they range from the local association that groups the B&Bs of a limited tourist area, to the national circuit; often a distinctive logo/brand is also adopted. The network is important because it allows the structure to enter into agreements with various operators in the tourism chain, travel agencies, local offer systems, in order to create thematic itineraries in the area with interesting economic effects for the members of the network.

Training opportunities

Courses, degrees and masters in tourism and in the hotel sector are very numerous: such a vast offer also depends on the high demand for training by young people and operators who are increasingly aware and feel the need to perfect their luggage of knowledge and skills, which can be spent on the labor market or to be contextualized in their professional and activity context.



3. 3. Competence profile of tourism professionals

The official certification of skills and competencies

The National Register of Tourist Competences (RNCT) contains the list of figures with knowledge, skills and competences in the tourism sector. The Italian Association of Tourism Professionals and Cultural Operators (AIPTOC), authorized by the Ministry of Economic Development (MISE) to issue the Certificate of Quality and Professional Qualification of Services pursuant to Articles 4, 7 and 8 of law 4/2013, recognize the Register.

The skills are divided into:

- Professional skills: complex skills based on specific existing and recognized professional skills (e.g. Manager for the Development and Competitiveness of Tourist Destinations, Expert of Cultural Heritage, Operator of Social and Sustainable Tourism, Hotel Manager).
- Thematic skills: basic skills, based on individual issues that professionals can possess: Tourist Heritage Area, Tourism Development Tools Area, Quality Management Area, Transversal Area (languages, digital skills).

In Sicily the regional law n. 8 of 2004 regulates the acquisition of the qualification of tourist guide, environmental guide hiker, underwater guide.

Training offer in tourism

➤ *The free training*

In Italy the "Catalog of the training offer" is the tool available to citizens who want to know the training courses to which you can enroll on the regional territory.

The Sicilian Region, in the context of active labor policies, to meet the strategic needs of companies and encourage the creation of new jobs in the local market, has defined a training plan that takes into account the analyzes and studies conducted on the needs of the productive sectors of the regional economy.

The actions are carried out through the use of the Regional Catalog of the training offer which, also in the tourism sector, contains training courses aimed at young people between 18 and 24 years of age and specialist training courses for the insertion of young people into the world of work.



➤ **The official education (Schools and Universities)**

Upper secondary education is the one after compulsory school (middle school) and is aimed at young people aged between fourteen and nineteen who can enroll in courses that last three or five years, after which they can choose whether follow university / higher education or enter the world of work.

The school system in Italy, in the context of upper secondary education for the hotel tourism sector, provides for the following classification of courses and diplomas:

COURSE OF STUDY	CERTIFICATE	DURATION
RESTAURANT SERVICES OPERATOR (BAR ROOM)	QUALIFICATION	3 years
RESTAURANT SERVICES OPERATOR (KITCHEN)	QUALIFICATION	3 years
RECEPTION SERVICES OPERATOR	QUALIFICATION	3 years
TOURIST COMPANY OPERATOR	QUALIFICATION	3 years
RESTAURANT SERVICES TECHNICIAN	DIPLOMA	5 years
TOURIST (Tourist Services Technician)	DIPLOMA	5 years
TOURIST EXPERT	DIPLOMA	5 years
BUSINESS ECONOMIC TOURIST	DIPLOMA	5 years
TOURIST (experimental - services and advanced tertiary)	DIPLOMA	5 years
TECHNICAL EXPERT FOR TOURISM ("ITER" project)	DIPLOMA	5 years
TECHNICIAN FOR TOURISM (SIRIO Project)	DIPLOMA	5 years

The courses of study in professional institutes are divided into a common two-year period, a third year of qualification (OPERATOR) and a further two-year (post-qualification) course (TECHNICAL):

- The QUALIFICATION DIPLOMA, issued after the three-year course of study allows access to the world of work, enrollment in the two-year post-qualification courses of the Hotel Institute, to pass, with supplementary exams, to the fourth year of secondary schools of another type, to attend training modules of a higher qualification level in regional vocational training schools.
- The DIPLOMA OF STATE is a valid qualification for enrollments in all university faculties and for participation in state and parastatal competitions pursuant to art. 3-law n 754 of 27/10/69. It allows you to be enrolled, without obligation of exams, in the special register provided for the management of a restaurant-hotel structure, in addition to access to the teaching of technical-practical subjects at the I.P.S.S.A.R.

In the University environment, the three-year Degree in Tourism Sciences allows you to acquire important skills useful for the planning and development of tourism, as well as to manage both the economic aspects and those relating to the promotion of cultural heritage.

Once the Bachelor's Degree in Tourism Sciences has ended, you can choose whether to continue training by following one of the Master's Degree courses in Tourism Systems Design and Management or whether to enter the world of work.

The University of Catania, as a three-year degree in Tourism Sciences, has provided for the degree course in "Training of Tour Operators". The course aims to provide basic preparation in the following areas: knowledge of English, French, Spanish and German languages and in-depth analysis of historical, archaeological and artistic studies from prehistory to the contemporary age; knowledge and understanding of the geo-economic aspects concerning tourist places and destinations, the management of tourism businesses also with reference to marketing in the various territorial, food and wine aspects, etc. Through guided visits to monuments and companies and above all through internal and external internships, students come into direct contact with the world of work.

Attitude testing for tourism

- Test on vocations and potential, such as the Vocational Orientation Method (nMOV) for teenagers which is a set of practical Tests and Workouts through which you can understand the primary vital, situational and relational feelings, the forms of happiness, the potential and values, attitudes, that are the foundations and forces for a path of change, elevation and self-realization.
- Skill games, games where one or more particular skills are required.
- Internship in tourist facilities, with a tutor who will provide explanations from the point of view of those who are already carrying out that particular job.
- Use of social networks (eg LinkedIn) to contact professionals in the sector.



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Erasmus+



SLOVAKIA



Source: <https://www.earthtrekkers.com/destination-slovakia/>

4.1. Tourism in Slovakia

Tourism is an inter-ministerial sector that directly affects the sphere of several sectors of the economy, such as trade and services, transport, regional development, culture and others. It is typical for tourism that while most other sectors deal with a relatively narrow segment of their activity along the vertical axis, tourism connects different sectors along the horizontal axis. It therefore involves several issues that can only be solved through cooperation.

It is also important to realize that Slovakia is a relatively small country with a population of approximately 5.5 million and an area of only approximately 47,000 km². The capital is Bratislava with about 800 thousand inhabitants. The rest of towns and villages, except for the town of Košice in the east of the country (approximately 400 thousand) are relatively small. Administratively, Slovakia is divided into 8 regions and these are also relatively small. The central and northern part of the country is forested while the southern part is flat. The territory is rich in water resources, cultural and historical monuments. The country has the prerequisites for active tourism based on natural conditions, quality gastronomy or human potential, which, however, does not develop sufficiently. The current pandemic crisis has affected tourism as a whole and the impact will only be seen in the coming months.

The percentage share of tourism in Slovakia's gross domestic product (GDP) in recent years has been around 2.6 percent, while the EU average is 5%. Therefore, **tourism has become one of the main topics** in the government's program statement for 2016-2020. This economic sector employs 160,000 people, which makes up 6.3% of total employment. Slovakia provides more than 4,400 accommodation facilities with more than 185,000 beds (December 2019). If we talk about accommodation capacity, we must also mention the phenomenon of **shared economy and short-term rent**, which is becoming a trend, especially among young people. In order to better understand the structure of visitors in accommodation facilities in Slovakia, let's look at data from 2017. This year, 5.4 million people in Slovakia used accommodation, which ordered 14.94 million nights. The statistics show that up to 3.21 million of the total number, for example 60% are domestic citizens. From the ranks of foreign visitors, Slovakia is interesting mainly for tourists from the surrounding countries (CZ, HU, AT, PL), who used our accommodation capacity in a ratio of 55:45 compared to visitors from other countries. From this we can clearly see that Slovakia is still to be discovered. Also perceived by most of the European Union as an undiscovered tourist destination.

It has been confirmed several times in the past that tourism is mitigating the effects of the economic crisis. Investments in tourism, quality staffing, services and the attractiveness of travel, result in the development of the region and subsequently the whole country. It is necessary to highlight the measures that were taken during the years 2016 to 2020. The measures taken by the government also helped to increase the number of overnight stays. The most successful measures include, in particular, allowances for pupils and students during ski courses and outdoor schools, as well as allowances for recreation, which will mean an increase in domestic guests in this and the following years. This positive increase will be felt not only by hotels or boarding houses, but also by catering facilities, spas, aqua parks, tourist information offices, historical and cultural monuments. All these services and attractions bind a number of related services and strengthen consumption. This has a positive impact on the collection of local taxes and fees, excise taxes, wage increases in the tourism sector. However, in the context of the impending recession caused by the pandemic, the question is how sharply and for a long time the current cessation of tourism, as a whole will affect its further start and overall recovery.



Tourism in Slovakia can be divided into the following categories.

- Rest and recreation
- Conferences and education
- Spa tourism
- Festivals and entertainment
- Business tourism

1. Rest & Recreation

Travel for relaxation has a rich tradition in our region. In our country it is associated with tourism, wellness, exploring natural and cultural beauties. The target group is wide: families with children, individuals, couples but also active pensioners. Slovakia is rich in historical and cultural monuments, many castles, chateaux and museums. The richness of nature, available hiking trails and trails in mountain areas, or water potential create conditions for leisure activities. In recent years, there has been a slow emphasis on cycling tourism, which, however, is still underdeveloped despite the area's potential. Due to the fact that towns and villages are rich in historical and cultural monuments, although smaller in size, it is possible to spend a few days exploring the regions and visiting these places, while this can be combined with today's really high quality and affordable gastronomic experiences.

2. Conferences & Education

In the past decade, there has been a sharp increase in tourism linked to various conferences, exhibitions and exchange stays in schools, but increasingly also in companies. This industry is connected with a number of accommodation and catering capacities, primarily in large cities such as Bratislava or Košice, but also in smaller cities and, of course, the most famous tourist destinations. There are plenty of quality congress hotels and facilities in Slovakia that are worth using. It is true that a large modern congress center lacks the capital, which makes it impossible to hold large international congresses.



3. Spa Tourism

Slovakia is known for its healing springs, where spa towns such as Piešťany, Trenčianske Teplice, Bardejov and many others were established. Natural healing springs are an important part of Slovakia's natural wealth and spas have a rich tradition in Slovakia. A large number of rehabilitation and medical staff are involved in the care of spa guests. Slovak spas are especially popular with guests from Germany, the Middle East and Israel.

4. Festivals & Entertainment

The phenomenon of festival entertainment did not bypass Slovakia either. Especially in the summer months, several smaller and larger festivals take place here with a capacity of 20-30 thousand visitors. Most festivals have a number of accompanying programs, where Slovak companies, startups and local producers present themselves. Young people mostly visit them from Slovakia and surrounding countries (CZ, HU, PL, AT)

4. Business Tourism

Since Slovakia's accession to the EU and the adoption of the euro, investments from abroad have started to flow to Slovakia. Not only the arrival of companies such as IBM, Lenovo, AT&T or Swiss RE, but also the production plants of Land Rover, Volkswagen, Kia or PSA Group resulted in an increase in the number of foreign "business" tourists. However, they came for work or education. They use the services of mid and high-end class hotels, consume more luxurious services and form a significant part of experiential gastronomy in cities.

Slovakia, as a country in the middle of Europe, has an advantageous location, a large number of cultural and natural beauties that it can offer. The constant development and modernization of accommodation facilities contributes to the overall satisfaction of domestic and foreign visitors. Quality services and tasty gastronomy have become the main attribute for the further development of entrepreneurs in the segment of hospitality, restaurant and cafe services in Slovakia. The proximity of major airports, such as WIE (Wien) and BUD (Budapest), also contributes to the development of tourism in Slovakia. Bratislava, as the capital of Slovakia, is becoming an interesting European destination for weekend trips to



explore and especially for fun. The share of foreign visitors accommodated in the capital in 2018 was 200% higher than the share of domestic visitors.

The development of our mountain areas also helps to increase the attractiveness abroad. The most visited are the High Tatras, the Tatranská Lomnica ski resort and the Low Tatras, the Jasná ski resort. Both received several awards in the categories of ski resorts up to 60 km. The Tatras area becomes an interesting recreational area for the catchment area within a radius of 300 km. numerous water parks with year-round operation, tree-crowned sidewalks, cycle paths and other attractions provide an opportunity for relaxation for a wide range of visitors.

Discover the beauties of Slovakia here:

<https://www.youtube.com/watch?v=rjUHqbdexPQ>

Developments in Slovakia during the pandemics

According to the World Travel and Tourism Council (WTTC), the global travel and tourism pandemic threatens around 50 million jobs, with tourism expected to decline by around 25% this year. At the same time, this sector accounts for about 10% of the global economy and jobs (note of 14.03.2020). In Slovakia, this number can be 85 -135 thousand workers in tourism out of a total of 160,000. Therefore, it is important to take such measures that will help maintain jobs.

4.2. Professionals working in the field of tourism

Although the decisive role in the development of tourism is played by the private sector, the role of the public sector is to formulate a strategy for its development and to define tools for its provision. Therefore, the essence of the state policy in tourism and the necessity of its new orientation is important. At present, the following institutions and organizations are the main bearers of decision-making processes in the creation of the state tourism policy:

- Government of the SR
- Ministry of Transport and Construction of the Slovak Republic - Tourism Section
- Self-governing regions - departments for tourism
- Regional and regional tourism organizations



The motivation for associating tourism entities into regional and regional tourism organizations is the provision of subsidies from the budget chapter of the Ministry of Transport and Construction of the Slovak Republic, which supports the main activities of regional tourism organizations through a subsidy mechanism in accordance with § 29 par. 10 of Act 91/2010 Coll. on the support of tourism, establishing 9 eligible activities (Table No. 2). The condition is registration at the ICE SR and there is no legal entitlement to the subsidy. The application, project, activity plan and budget forms are adjusted by decree. The Tourism Section of the Ministry of Foreign Affairs of the Slovak Republic also provides mainly legislative, strategic and conceptual activities, promotes stimulus measures in the tourism business environment, collects and evaluates statistical data from banking and accommodation statistics, active foreign and domestic tourism, operates the CR information system - national portal Slovakia travel - and presents Slovakia as a tourist destination at exhibitions, fairs, workshops, campaigns and press conferences.

The regionalization of tourism in the Slovak Republic divides the Slovak Republic into 21 tourism regions, which do not correspond to the eight administrative regions. Self-governing regions have in their organizational structures a department also providing issues of tourism in accordance with Act no. 302/2001 Coll. on self-government of higher territorial units and its provisions §4 par. (1) letter m) on the creation of conditions for the development of tourism and the coordination of this development and § 5 on international cooperation, from Act no. 461/2001 Coll. on the transfer of certain powers from state administration bodies to municipalities and higher territorial units, from Act no. 503/2001 Coll. on the support of regional development as amended and from Act no. 91/2010 Coll. on the promotion of tourism, as amended.

In April 2019, the ICE SR launched regular consultation meetings with representatives of the local government with regard to better information, cooperation and coordination of activities in support of tourism. Tourism organizations (7 regional, 37 regional) are associations of self-governing and business entities in the field of tourism services, which form a common platform for the development of tourism in the destination. Every CR entity located within the territorial scope of the OCR has the right to become a

member. The use of subsidies is to help create a comprehensive product in the regions and thus increase traffic.

In addition to what is mentioned above, there are a number of organizations operating in Slovakia that operate directly or indirectly in the field of tourism and have a different legal form, respectively and they do not fall directly under the subsidy mechanism. These are various professional associations of producers of regional products, associations of local governments and entrepreneurs, various micro-regions, associations of local governments - part of the agenda is also the promotion of the area and the use of its tourist potential. Furthermore, we can talk about the activities of clusters, various interest groups, civic associations and the like. Together, they all form the basis of actors active in the field of tourism.

Many branches of the national economy are linked to tourism. We can talk about direct and indirect (secondary) links to tourism. Seasonality is also an attribute that we must take into account, because it affects a lot of jobs. These workers often have other responsibilities during the season and off-season, or in the summer season and in the winter season. Let's look at which sectors or business activities are linked to tourism.

Directly linked to tourism:

- Hotels
- Tourist guides
- Travel agencies
- Airports and airlines
- Mountain rescue services
- Tourism information offices

Indirectly linked to tourism:

- Restaurants and cafes
- Taxi
- Car rental
- Sports and cultural events
- Train transport
- Road network, its construction and maintenance
- Construction activity



The provision of services in tourism is associated with a great need for live work. This is related to the nature of the activities of tourism enterprises, where personal services predominate, to the seasonality in tourism and the related fluctuations in the frequency of participants - tourists.

Employment in tourism can be primary and secondary. Tourism not only affects primary employment, ie it directly creates job opportunities through which the needs of customers are directly met, but due to the multiplier effect it also creates secondary employment, ie it creates job opportunities in sectors providing and following the development of tourism, such as construction, transport, trade and services. Hotels and restaurants have a significant share in job creation.

Due to the multiplier effect, each job will create 1.5 to 2 jobs in downstream industries. When creating job opportunities in tourism, it must be taken into account that, in addition to the high consumption of live labor and its only partial replacement by technology, its capital intensity is. Thus, to create one job in hotels or restaurants, it is necessary to spend more than € 30,000. The capital intensity for the creation of one place in tourism is therefore up to 3 times lower than in industry or agriculture.

However, employment in tourism faces several risks. Seasonality affects the economy of tourism by the need for live work, especially during the summer and winter seasons. This is most evident in accommodation and hospitality services. Due to seasonal demands on the workforce, the quality of services is declining. When providing services, employers require universal skills from workers, instead of specialists. Up to 45% of jobs in the hotel and hospitality industry do not require more than just basic education, or instruction and training. This seems advantageous because it does not require professionally trained staff to create the job. However, this has an adverse effect on the quality of work. With the development of tourism came higher demands on employees. We can talk about "basic skills", which are a necessary condition for working in tourism. Personality prerequisites such as helpfulness, communication with the customer, coping with stressful situations and the like have become necessary prerequisites for the recruitment of permanent and seasonal employees. In facilities providing higher standard services, employers are increasingly paying attention to the "advanced skills" of their employees. These are mostly various bartending and barista courses, knowledge of foreign languages, experience and recommendations from previous jobs.



A separate chapter is small entrepreneurs and startups directly or indirectly related to tourism. Tourists become more and more demanding from year to year, both in terms of the quality of services and the quality of their time. They are willing to spend more, which is directly related to raising living standards in the region.

Words such as locality, ecology and sustainability are increasingly penetrating the tourism industry. There are a number of small entrepreneurs who provide private accommodation, accommodation with a family atmosphere, or other added value, which, on the contrary, cannot provide large hotels. Catering facilities highlighting the experiential gastronomy of the region with new added value, such as an experiential dinner on top of a mountain with a snowmobile ride.

This new trend of supporting small businesses and producers is generally very well received and responds flexibly to it. Subsidies and support schemes that come into tourism also help the overall boom.

Further education is a malnourished variable in the development of tourism. Employers are not able to take care of upgrading the qualifications of workers. Currently, there is no comprehensive scheme of continuing education for employees in tourism. Suppliers for the HORECA segment try to fill this gap at least in part, by organizing courses for bartenders, baristas and service staff. Here, however, we encounter purposeful education, which is mainly focused on the sale of a particular item. Thus, it is more a matter of promoting the sale of products than of conceptual education.

Low qualification requirements also affect earnings. Wages in accommodation and hospitality services are 20-30% lower than the average wage in the national economy of the Slovak Republic. Such jobs are not attractive enough, for example due to low earnings. However, this fact is mitigated by the fact, that low earnings compensate a certain percentage for those who are voluntary and used in the Slovak Republic at the level of 5-10%. However, this benefit is only applicable in the gastronomic sector.

Additionally, to the abovementioned conditions, the sector is not attractive for women (who are 65% of the working force in the tourist sector) as a consequence of the unfavorable working hours. The division of work shifts, work during holidays and weekends, work until late at night, or an unsatisfactory working environment makes the sector less attractive. In tourism, compared to other industries, we can find many small entrepreneurs and sole traders, many of who do not create any jobs other than the owner.

4.3. Competence profile of tourism professionals

Candidates can acquire education for the tourism segment at a secondary school, which is completed by a high school diploma, or continue to a university with a bachelor's or master's degree.

High school education usually takes the form of full-time study lasting 5 years. The study is completed by a school-leaving examination. In recent years, the dual education system has begun to be promoted. This system aims to link the teaching process with real market requirements and especially with employers. During their studies, students work closely with companies such as hotels, restaurants, catering services, or spa houses, where they learn a lot of practical knowledge. After graduating from school, they are better prepared to take up employment in the field they studied.

What does studying at a "hotel" high school bring for its graduates? After completing this school, graduates are:

- Able to perform professional activities in hotel and restaurant services, perform work related to the management and organization of economic activities and operations in hotel facilities of restaurant catering, special purpose catering and temporary accommodation
- Able to perform economic activities associated with the acquisition and processing of information in the provision of services, supply and sales, human resources, administrative management, accounting
- masters information and communication technologies, the basics of economic correspondence and accounting
- Knowledgeable about food, beverages, technological procedures, preparation of various types of food and beverages by traditional and progressive methods, knows the principles and techniques of dining, the technique of simple and complex operation
- During his / her studies he / she completes 1,400 hours of practical training, of which 1,200 hours are professional training focused on service skills, food preparation and managerial skills in the operation of tourism companies
- Business and manual skills, is able to create business plans in the subject of business, is able to orientate in the legal norms of the subject of business



- Expert adaptable to work in related fields and able to apply the acquired knowledge in practice
- Versatile, language-skilled (two foreign languages) expert in the field of tourism is ready to continue his university studies.

After graduation, it is possible to continue at the University and obtain an education with a bachelor's or master's degree. The University of Economics in Bratislava or the Pan-European University offer the opportunity to study the management and marketing of tourism.

What does a University study bring to its graduates? After completing their studies, graduates have:

- Acquired advanced knowledge from tourism, management, marketing, economics, informatics, business in tourism, interpersonal and intercultural communication, multicultural education, geography and other disciplines
- Hold managerial positions in accommodation facilities, spas, hotels. Graduates are able to manage large groups of people grouped into various specialist departments in spas and hotels, including international networks at the top and middle levels of management.

In recent years, several bartending schools have expanded in Slovakia, and the Slovak **Bartenders' Association** has also been established. The success of Slovak bartenders on the world stage contributed to the expansion of the bartending craft. The prestigious "Bartender of the year" competition was won by Erik Lorincz in 2015 and Martin Hudák in 2019, and thanks to these personalities from the bar world, working in gastronomy in our region was promoted and gaining more fans.

Rising hotel standards and the offer of added services result in higher wages and an improved working environment in tourism. However, there is still a lack of a comprehensive concept of acquiring new knowledge, especially the implementation of trends that are becoming standard in the world but have not yet reached us.

In addition to the above formal education provided by Universities and secondary vocational schools, it is possible to complete various trainings and workshops offered by private education institutions and training centers. The graduate will receive a certificate that can be accredited by the Ministry, but this is not decisive. Based on the said certificate, certain professions can be performed, such as a tourism guide.



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CONCLUSIONS

This desk research has provided an overview about the structure, trends, opportunities, challenges as well as profile of workers in the tourism sector in three Mediterranean countries (Greece, Italy and Spain) and one central European country (Slovakia). The findings from this desk research will serve as a basis for the design and development of the Flexitour training course.

Until the outbreak of Covid-19 pandemics, **travel and tourism** has become one of the **leading engines of the EU economy growth**, featuring an ongoing increase in GDP contribution in all involved countries. Tourism represented the 30,9% of the GDP of Greece, 12% of the GDP of Italy and 11% of GDP in Spain, all countries with a consolidated, well-developed tourism industry and a huge diversity of segments such as experiential tourism, culture, gastronomy, cruise tourism, health & spa, nature, etc. However, this favorable economic growth was implemented under the framework of mass tourism, characterized by the use of standardized package products and mass consumption. The development trends in the field of travel and tourism were positive and rising, especially in the field of business tourism and events organization, until the outbreak of Covid-19 pandemics, declared by the WHO in March 2020.

The profile of workers in the Tourism sector is very rich both in the field of private and public sphere. This category includes a huge variety of profiles such as policy makers, experts in the field, tour operators, hotel managers, tourist guides, receptionists, entertainers, travel info point staff, teachers & trainers in the field and a large etc. This study has **identified new, emerging profiles** which include travel consultants, claims specialists, copywriters, Javascript and Python developers. Even so, these profiles will have to be adjusted to the new demands of the "after" Covid-19 market, decreasing and/or eliminating products and services while unleashing new opportunities. In this sense, apps using georeferencing offering added value to contents and services, social media marketing, virtual travels and storytelling will probably replace some more traditional means.



The variety of programs delivering sector specific training is very complete in all involved countries at all levels. At Higher Education level, the training offer includes bachelor's degrees in Tourism, tourism management, Leisure Management; Master's Degrees and PhD programmes. At VET level, the offer includes both, professional certificates, specialist courses and seminars on tourism.

As to the competence profiles, we have seen that in the Mediterranean area there are several legal bodies that issue diplomas and certificates and count with a **competence framework**, containing specific skills-sets for each profile. For example, while the Greek profile differentiates between competences and abilities; the Italian differentiates between professional and thematic skills.

It is widely accepted that there are **"basic skills"**, which are a necessary condition for working in tourism. Personality prerequisites such as helpfulness, communication with the customer, coping with stressful situations have become necessary prerequisites for the recruitment of permanent and seasonal employees. In facilities providing higher standard services, employers are increasingly paying attention to the **"advanced skills"** of their employees. These include knowledge of foreign languages, promotion skills and advance knowledge of social marketing.

This study has detected the need to adopt alternative methods to mass tourism, to support local development and local economy, economic growth and prosperity but respecting the environment and decreasing mass consumption. These alternatives could be i) explore **experiential tourism from a more sustainable perspective** – an alternative could be agritourism; ii) **provide for innovative products and experiences oriented to different target groups**, including youth and elderly; iii) develop **new ways to travel**, for example by improving virtual tools, combined with storytelling. iv) support the sector in the **acquisition of new skills and competences**, as consequence of the Covid-19 pandemics and the new sector requirements.

