From Second Choice to Second Chance – Learning Opportunities in TourismSME

IO 1 Requirement Analysis Synthesis Report

Alexander Krauß, Gerhard Stark, Gabrielle Marchl, Cristina Novac

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Elaborated in the project:

Self-Responsible Learning of Key Competences in Tourism SME - a Mean to improve Competitiveness and Employment

2014-1-RO01-KA202-002766

Leader of the activity: ISOB, Germany

Partners: FPIMM, Romania

Gazi Universitesi, Turkey

AEVC, Portugal

Supera, Croatia

FEPPV, Portugal

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ABBREVIATIONS

FPIMM - Fundatia pentru Promovarea Intreprinderilor Mici si Mijlocii, Brasov, Romania

ISOB GmbH - Institut für sozialwissenschaftliche Beratung GmbH, Regensburg, Germany

Gazi Universitesi- Gazi Universiesi, Ankara, Turkey

AEVC- Associação Empresarial de Viana do Castelo, Portugal

Supera -Supera poslovno upravljanje d.o.o., Zagreb, Croatia

FEPPV - Fundação de Ensino Profissional da Praia da Vitória, Portugal

DEFINITONS USED IN DOCUMENT

Tourism SMEs	small hotels, restaurants and catering
TouriSME Comp	Abreviation of the name of the project
Focus group	group represented members from various backgrounds and perspectives, as TourismSME owners, managers working in tourism, academics, consultants, association representatives

EXECUTIVE SUMMARY

Partners of TouriSMEComp studied the situation of tourism in their countries through desk research, focus group interviewing and a survey among TourismSME which turned out 91 responses. As a general result it was revealed that the general approach of the project is relevant and appropriate for the situations that were described by the partners based on their research.

While the target group of very low qualified employees for which the tourism sector can be a chance to enter the labour market seems to be particularly relevant and problematic in some situations, the tourism industry as a whole suffers from qualification problems, which impede improved learning chances for very low qualified groups. These consist mainly in a labour force and partly management for which working in the tourism industry is regarded as a second choice only and as a temporary "job", rather than a vocation for which they are fully engaged.

Quality problems in service provision are a consequence.

The eight key competences for lifelong learning, as described by the EC, are regarded as highly relevant for high performance in the tourism industry by the partners and the TourismSME surveyed.

In particular the competences of good communication, pro-activity and sense of initiative and entrepreneurship are the most relevant.

The consultancy concept to be developed in the project as well as the supporting materials should therefore focus on fostering these competences.

Since most of the businesses surveyed perform relatively well and also implement some degree of workplace learning, consultancy concepts can build on actual practices, which need to be increased, systematized and appreciated, as a main strategy of intervention.

The sense of commitment, ownership and pride to be a high performing part of the professional tourism community should be initiated and increased in the employees. Cooperation among TourismSME should be strengthened.

These results are backed by data from three comparatively independent sources and apply to all of the partner countries.

Details of learning needs and learning prerequisites differ among the partner countries and should be taken into account by the national partners.

1. CONTEXT, AIM AND METHODOLOGY OF INQUIRY

This paper will report on the results of an inquiry on the state of the art of workplace learning and development of the eight key competences for lifelong learning in tourism in the partner countries of the ERASMUS + project TouriSMEComp (Self-Responsible Learning of Key Competences in Tourism SME- a Mean to improve Competitiveness and Employment - 2014-1-RO01-KA202-002766).

The project is focused on improving the conditions for the acquisition of the eight key competencies for lifelong learning in tourism employees, particularly in those with a comparatively low level of prior academic achievements. Partners of the project come from Romania (promoter), Croatia, Portugal and Turkey. ISOB GmbH from Germany is the partner responsible for the Intellectual Output 1, the inquiry on the state of the art and the learning needs.

Partners include:

Lead partner: FPIMM (Fundatia pentru Promovarea Intreprinderilor Mici si Mijlocii) Brasov, NGO

Germany: ISOB GmbH (Institut für sozialwissenschaftliche Beratung GmbH), Regensburg

Turkey: Gazi University, Ankara

Portugal: AEVC (Associação Empresarial de Viana do Castelo), Business Association, Viana do Castello

Croatia: SUPERA (Supera poslovno upravljanje d.o.o.), Consultancy Company

Portugal: FEPPV - Fundação de Ensino Profissional da Praia da Vitória

The general objective of the Requirement Analysis Report according to the application is to improve the knowledge about details of the attainment of key competencies in Tourism SME employees, as well as the state of competency development strategies in Tourism SME.

In addition to that, the process and results of the study should raise awareness for the state of skill development in Tourism SME and sensitize the stakeholder public for the necessity of investing more in the building of key competences of Tourism SME employees with low academic attainment.

Steps included:

- elaborate methodological guide and instruments to collect information
- analysis of literature and related secondary data
- set up of Focus Groups by country/region and conducting focus group meetings
- survey of Tourism SME
- elaboration of a synthesis report including the contributions mentioned above, including the

On the basis of the latter, the project partners identified needs in order to…

- …define the necessary learning methods and coaching/mentoring profiles,

- …elaborate of a short report in each country/region (PT, TR, RO, HR)

The methods used included desk research for the literature, content analysis and questionnaire based survey of TourismSME; interviews and focus groups were implemented in each operative partner country.

The study was based on a number of general hypothesises of causal factors of problematic situations in Tourism, which had to be validated or falsified by the needs analysis and state of the art research implemented.

 "**Needs analysis**: The Tourism sector is a backbone of the EU economy. It is based on   SMEs representing 99% of businesses. The promotion of successful entrepreneurship and improving the business environment for these SME therefore is a key priority of European policy.

Most of the Tourism SMEs staff is low skilled workers, often migrants without the adequate competences.

Often companies do not invest in these employees.

Adapting tourism activity to globalisation and new market demands however will **require** additional efforts to **improve the professional skills** like IT, meeting customer expectations, flexibility and responsiveness.

The acquisition of professional skills relies on the creation of learnability, i.e. the ability to learn.

The **8 key competencies for lifelong learning** (EC (Recommendation 2006/962/EC) give a framework of the necessary competences to acquire. [1]

Acquisition of these key competencies will make employees more productive in itself, but is also a prerequisite for further, more formal training.

Therefore **SME need qualified supporters** (facilitators) of their learning, using appropriate, specific and targeted concepts and tools to define and implement learning strategies. This means, in contrast to external seminars, learning packages allowing the integration of work with learning.

The **approach** to be taken is one of **empowering the low qualified workers** the hospitality SME to develop their competencies by self-evaluation and self-reflection processes accompanied by coaches/mentors within the company.

Here the role of the **SME managers is fundamental**. They must play the role of coaches/mentors supporting the process of skills development of their workers.

Having in consideration that also the **managers of these Tourism SMEs** (small hotels, restaurants and catering) **are very often lacking the basic skills** on good communication and on using foreign languages necessitate to apply the process of empowering to the self-development of the managers themselves providing them the coaching/mentoring competencies in order to put them in practice with their own staff.

To have a systemic approach it is also **necessary to develop the profile of the trainers/coaches that normally work with Tourism SME in order that they are able to implement the new learning concepts**.

These new consultants (facilitators), must introduce Tourism SME owners and managers to new methodologies and at the same time be coaches/mentors of the SMEs managers working with them and supporting their empowerment to establish these kind of development strategies for their companies and for the sector. "

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[1] Communication in mother tongue, communication in foreign languages, mathematical competences and basic competence in science and technology, digital competence, learning to learn, social and civic competence, sense of initiative and entrepreneurship, cultural awareness and expression

The report to follow will describe the outcomes of the research described with regard to the degree of validation or falsification of these hypothesis. Additionally it will present other and additional findings, that enhance the understanding of the situation.

Three target groups are directly addressed by the project: Consultants, Tourism SME Mangers and Tourism SME low skilled employees. The project activities will have relevant results for all of these groups.

The desktop research implemented by each partner was based on the guiding questions to follow:

1. What is the general situation and relevance of tourism in your country?

2. What is the relevance and proportion of SME in the Tourism Sector?

3. Please give a brief overview of the general Training System for Tourism (School-based? Is it company based? Based on certified training? Does informal training in family businesses dominate in SME?)

4. Please estimate or make reference to secondary data on the overall percentage of skilled workers vs unskilled workers in tourism (estimate if secondary data are not available). (Skilled meaning a degree from a tourism school (or University) or professional degree from a 2 year + apprenticeship programme).

5. Estimated percentage of women among skilled/unskilled workers Estimated percentage of migrant workers/minorities among skilled/unskilled workers.

6. Estimated percentage of persons without a school degree among skilled/unskilled workers (quote secondary data if available) In addition to quantitative description, please also **describe** the situation of these groups as far as covered in the literature as well according to your own expert opinion.

7. What are the main stengths/weaknesses/opportunities for the tourism industry in your country (keypoints)

8. What are the main qualification challenges? What are the strengths and weaknesses of education and training, particularly in TourismSME?

9. Please describe the typical qualification of Tourism SME **managers!**

10. Does the training of SME mangers include training of staff? If yes, to what degree (proportion of training program, part of exam?)?

11. What support structures (organisations/institutions/service providers) exist for TourismSMe? Do they support training in SME? Are their services in demand?

12. What are, according to the literature and your prelimiary expert assessment the main qualification/competence gaps found in
    a) formally trained staff in TourismSME
    b) staff without formal training ?

13. Have there been projects to foster the acquisition of the eight **key competenccies** for life long learning in your country? If yes, please describe main outputs and give references!

14. Have there been projects to foster the qualification and learning of Tourism SME staff? If yes, please describe main outputs and give references!

15. Please describe the **state of the art of facilitated (informal) learning at the workplace** in your area. Are you familiar with the concept? Is it used widely? Are there institutions/organisations supporting such learning?

16. Please add **any other information** or finding of literture as well as your own observations, you think is relevant for our project analysis of need.

17. References, literture, websites, blogs.

The Focus Group Research was implemented through setting up a focus group of **at least five key informants** on the topic and conduct a **focus group meeting** along guiding questions.

The Focus groups represented members from various backgrounds and perspectives, as TourismSME owners, academics, consultants, association representatives and lasted more than two hours each.

Also **the focus group meetings were supposed to also form a core group of Tourism SME experts who will help to mobilise the target audience and disseminate the results**.

For the creation of the National Advisory Board as well as for developing the dissemination strategy of the project in each national setting partners used a systematic **stakeholder analysis**.

The focus groups were facilitated along the guiding questions to follow:

1. What is the general situation of the regional Tourism industry?

2. What are main STRENGTH, WEAKNESSES, OPPORTUNITIES,THREATS

3. Situation of low qualified employees: Please describe the situation of low qualified employees in Tourism: Who are they? What is their situation? What do they want? (ambition to progress, working conditions, mobility etc.) What are their typical formal and informal qualification / competences?

4. Situation of training.
    How is training in the Tourism SME organised?
    Describe typical patterns of formal/informal training, give examples.
    What do you percieve as strengths/weaknesses of these training patterns?
    What are the reasons for doing it this way vs. other options

5. What, in your perspective, is the top priority to improve the situation, in terms of startegies that can be pursued by regional actors like employers associations, training centres, TourismSMEs etc.?

In order to substantiate and quantify to some degree the findings of the desk research and focus group research, partners surveyed TourismSME, mostly restaurants, bars, hotels and to a small extent other Tourism SME. Partners reached out to up to 100 organisations each in order **to achieve a turnout of at least 20 Tourism SME**. They collected the answers, translate the answers to English and uploaded data to an online survey system provided by the development leading organisation.

It has to be emphasized, that this exercise is limited in scope, resources and aims, as it is strictly oriented to the practical requirements of adapting and further improving the products of TouriSME.
No comprehensive analysis of the situation of Tourism in the partner countries has been intended.
Much more, a selection of existing research and knowledge has been studied by the partners as far as they were accessible and relevant for the aim of the research.

The research has been conducted using guidelines provided by partner ISOB **(Working paper "Self-Responsible Learning of Key Competences in Tourism SME -**

a Means to Improve Competitiveness and Employment " O 1 Requirements Analysis Report O 1-1 Methodological Guideline").

Taking into account the action research approach of the inquiry the focus has been more to engage the target groups and experts in dialogue and to mobilise them to take part in the activities of the project either as members of the advisory committee or as testing partners, rather than securing the easy comparability of the data obtained. Also the reporting of qualitative information from the different situations in the partner countries had priority as an exploration of the situation. It was not intended to achieve representative samples of target groups or to collect statistically valid quantitative data.

Partners had substantial latitude in conducting the research and Focus Group interviewing. The same applies to the desktop research, taking into account the inhomogeneity of availability of literature and differences in topics covered by it.

2. PART 1: GENERAL ANALYSIS TOURISM SITUATION AND LEARNING NEEDS OF TOURISM SME EMPLOYEES IN PARTNER COUNTRIES

The chapters to follow will discuss the results of all parts of the research with regard to the general results, which will be relevant for the further elaboration of the analysis of causal factors, as represented in the guiding hypothesis of the project. Also the relevance for general principles of product development will be discussed.

A full presentation of the research findings of partners can be found in comparative tables, summarising the findings of the desk research, the focus groups and the Tourism SME survey. These can be found in chapter 3.

2.1. General Situation and Relevance of Tourism in Partner Countries

The project TouriSMEComp is based on the insight, that "the Tourism sector is a backbone of the EU economy. It is based on SMEs representing 99% of businesses. The promotion of successful entrepreneurship and improving the business environment for these SME therefore is a key priority of European policy."

The project is based on the hypothesis, that therefore, enhancing the competitiveness of TourismSME can make a substantial contribution to the economy of the partner countries as a whole. The desk research as well as the focus group research validated both hypotheses to a very high degree.

While Portugal, Croatia and Turkey are "Tourism Countries" where Tourism makes a substantial contribution to the national economy, in Romania the contribution on the whole is small. However, the natural beauty of the country, according to the respondents, provides a big opportunity to develop the sector in the future. Also there is quite some dynamic development in some regions, the region of Brasov being among them.

While tourism contributed just over 5% of GDP in Romania, this share is well over 10% in the other partner countries.[2]

As points to emphasize the partners highlight in Croatia, that Tourism at the moment "is the only healthy economic activity".

In the focus group participants underlined the strategic importance of the capital region of Zagreb, which represents a quarter of the population and is a ever more popular tourist destination in its own right, next to its importance as a infrastructure hub.

In Portugal Tourism represents 14% of all exports and is therefore a strategic sector, whose weight also increased in the last decade. The two regions in Portugal also state a high potential of tourism. While the Azores saw a rapid increase of tourism in the last ten years, the "Minho" region, according to the focus group participants, has very high potential, but suffers from a lack of marketing and coordinated strategy.

In Turkey, which is "the sixth most important tourism destination in world" the sector is very dynamic, with guest arrivals increasing by 37% in the last ten years.

While international tourism is less common in Ankara, business travel is an important factor and a lot of new establishments have opened in recent years, increasing competition, partly from owners and managers without roots in hospitality.

Romania on the other hand, coming last among European countries in GDP share of tourism and on place 136 in the world in tourism employment (3,6%), dynamic regions include Bucharest and Brasov. Here winter sports and summer tourism as coach tourism, made the creation of new hotels and restaurants possible and puts the county at first place in Romania.Nevertheless, the sector suffers from bad image and comparatively low wages.

Partners focus groups summarised the strengths, weaknesses, opportunities and threats of the tourism sectors in their countries as follows:

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[2] Table „general situation", p. 67, Focus group results, p. 47

S
- Transportation hub for the rest of the Croatia
- Good infrastructure
- Increasing quality in the hospitality industry
- Growing number of tourists
- Offer for winter and summer tourism
- Improving night life
- Improved tourism regulations

W
- High level of taxes
- Weak marketing and promotion
- Lack of entertainment
- Weakly defined tourist offer

STRENGTHS   WEAKNESSES
OPPORTUNITIES   THREATS

O
- The creation of Zagreb as a tourist destination
- Cooperation with other tourism regions - historical connection
- Orientation of a particular type of tourists
- Improve the tourist offer with additional content
- Increasing number of hostels and hotels
- Renewed camp facilities

T
- Poor cooperation between the subjects of tourism offer
- Limited sources of financing for development
- Increase of price for accommodation and beverages

Ill.: SWOT Croatia

Erasmus+

S
- Geographical position of the island, within the archipelago (*AZORES)
- Important offer in cultural tourism, highlighting the historical and monumental heritage; , crafts and events traditional character
- Reduced tourism intensity;
- Rich and diverse tourist offer
- Dynamic private tourism investment, focusing on Minho- Lima

STRENGTHS

W
- Dependency on tourism operators (Azores)
- Positioning tourism with diminished action, animation or emotion.
- Lackmof a tourism promotion strategy of Minho, concerted between private and public agents
- Human Resources poorly qualified and without career vision
- The corporate capital is generally weak and run by people without training in tourism

WEAKNESSES

OPPORTUNITIES

- Increase the commercial vitalisation of the offer
- Direct the offer to specific niche markets;
- Create specialised agents and operators;
- Opening of air space.
- Betting on Human ResourcesAffirmation of Minho brand
- Viana do Castelo Cruise Terminal
- European financing programmes for investments

O

THREATS

- Stagnant tourism
- Loss of investment opportunities for other regions
- Financial and economic crisis
- Major internal competition, S. Miguel, the largest island, concentrates around 70% of the region tourist demand *Azores)
- Access to some islands still very expensive;
- Weak Tourist Demand.

T

Ill.: SWOT Portugal

S

- Unexplored destinations
- Geographic location
- Hospitality
- Nature
- Young population
- 4 seasons holiday opportunity
- Modern facilities in some regions

W

- Lack of qualified staff
- Low budgeted tourists visit
- Due to the all inclusive system Turkey cannot get enough income compared to Spain and France
- There is a contradiction between tourist arrivals and income
- Substructure and superstructure problems
- Problems in tourism education

STRENGTHS **WEAKNESSES**

OPPORTUNITIES **THREATS**

- Turkey is an EU candidate
- Thus better Turkey image,
- Turkey has many civilization reliefs, so it has many historical places important for Christianity and Islam
- Turkey is a suitable destination for third age tourism.

- Geographically, Turkey is close to Middle East so the problem of Middle East reflect in Turkey as well
- there is raising rate of terrorist assaults in world , especially in Middle East
- Deterioration of natural, cultural and historical attractions due to unplanned investments

O **T**

Ill.: SWOT Turkey

S

- Brașov is an easily reachable area with good infrastructure located in the center of the country, not far away from Bucharest in order to take advantage of the touristic flow from the capital.
- Cultural similarities with German community
- Existence of a tourism infrastructure: pensions, hotels and restaurants

W

- Existing sights are not enough valorized (renovation/restoration and improvement of architectural environment of the buildings)
- The area is not enough promoted abroad
- Low managerial capacity related to the valorization of existing sights
- High level of taxes, frequently changes of fiscal legislation

STRENGTHS   WEAKNESSES
OPPORTUNITIES   THREATS

- European financing programmes for investments in tourism and buildings rehabilitation
- Non-reimbursable training programmes for the employees
- Development of on-line environment

- Development of touristic centers that polarize the attention of local and foreign tourists (Austria - for ski,
- Sibiu – for business tourism etc.)
- Potential conflict in the Ucraine

O   **T**

Ill.: SWOT Romania

It can be concluded that the initial hypothesis, that tourism was an strategic sector with high employment and development potential, has been validated by the research. Tourism is already one of the most strategic sectors in three of the partner countries, while it is regionally very relevant also in Romania. In all of the partner countries there are important opportunities in tourism, while qualification deficits are among risks and threats.

2.1.1   Relevance and Tradition of SME

The application for the project claims that SME are the most relevant size of companies in the tourism sector. Therefore strenghthening SME is core for an effective intervention: "The Tourism sector is a backbone of the EU economy. It is based on SMEs representing 99% of businesses. The promotion of successful entrepreneurship and improving the business environment for these SME therefore is a key priority…".
Also this hypothesis has been verified by the research.
All partners report a share of well over 95% of SME in terms of number of establishments as well as employment.
Also in the sample of our own survey, all of the respondents are SME, of whom 35, 6% are micro enterprises of up to 9 employees and only 15,6% have more than 30 employees. Within this sample 46,2% are establishments without accommodation, 31,9% are hotel only and 18,7% are hotel and restaurants.

As described in the desk research and the focus groups, the dynamism in Turkey and the creation of new competition is validated by the survey results, as in Turkey 33% of the businesses responding exist for only up to 5 years. In all of the other countries this proportion is under 30% and establishments existing over 10 years are the majority.

It can be concluded that the hypothesis of preponderance of SME has been verified. The focus group and particularly the survey have included such companies. Therefore, a sample relevant to indicate typical patterns and development in the sector has been contacted and surveyed.

2.1.2 Employees of TourismSME and the Training System: Tourism-Second Choice rather than Second Chance

Based on literature and prior experiences, the application claimed that low qualified workers are a major group of employees in Tourism SME: "Most of the Tourism SMEs staff is low skilled workers, often migrants without the adequate competences. " The application implied that investments in training of these workers is low: "Often companies do not invest in these employees. " The intervention was necessary, as "Adapting tourism activity to globalisation and new market demands however will require additional efforts to improve the professional skills like IT, meeting customer expectations, flexibility and responsiveness."

In order to substantiate these claims the research had to look into the characteristics of employees in the partner regions, their education and training arrangements in SME. In particular, the question "Who has to be regarded as >low qualified<" would depend on the respective training systems.

As a general result it can be said that the majority of employees in the partner countries have a standard school education, few are school dropouts or come from minority or migrant or in other ways excluded populations.

There are groups among employees and also owners of hotels and restaurants in Portugal and Turkey, who rely more on practical experience, as the school system itself has not been as developed as it is today in their formative years in the 60ies and 70ies. In Croatia (part of former Yugoslavia) and Romania to the contrary education was universal, so almost the whole population had a at least 10 year education, often including vocational tracks.

All of the partners report a share of "unskilled" workers of about 10-12%, which means persons without a complete 10 year school attendence and/or the basic vocational courses/degrees of any kind.

While this group, therefore, does not represent the majority of the employees, it is still relevant.

On the other hand, employees and even mangers, who have received a full and formal vocational or University level tourism specific training, seem to be in the minority in all of the partner countries.

The majority of the employees and even managers and owners enter the sector with general education, training in other occupations or other University degrees.

All of the partners report substantial qualification problems and the skills of staff are assessed as being rather weak, as is motivation. This extends to management.

Therefore, there in fact is a qualification problem in Tourism, which impedes its competitiveness, but it is slightly different than expected:

While employees and managers often have a good education, this education often is not Tourism specific. Employees moved to the sector from other sectors, because they could not find work there and therefore work in Tourism in order to sustain themselves or because they see some opportunity there.

Tourism services have not been their first choice (as expressed in the choice of education and training path), but they are forced by the crisis and/or a general lack of other opportunities to work in tourism, a sector where there is employment, however employment with low prestige, low salaries and few career opportunities.

As a consequence the sector is dominated by a workforce that is not fully committed and motivated for the content of the work, regards it as a temporary way to make some money and therefore does not fully use the potential of the content of the work, does not fully use the carer and development opportunities that are there and lack the attitude and commitment necessary to be fully productive.

In this case learning priorities would be rather issues of general attitude and commitment, therefore basic motivational prerequisites of learning as well as key competencies as entrepreneurship, rather than basic tourism specific skills and qualifications. Learning for this target group must in particular be about strengthening the commitment and demonstrating the potential of tourism occupations for self-development and entrepreneurship.

Facts and insights identified by the desk research, focus groups and survey to substantiate this modified causal analysis include:

Romanian partners claim that "the sector is not preferred by the working population…earnings bare lower…work is exhausting…low social prestige…lack of promotion opportunities…"

"Less than 20% of graduates from specialized training institutions work in the sector…a great number of trained personnel are leaving the country."

In Portugal partners claim that "sector is dominated by low levels of education and qualification...a high percentage of managers with basic schooling...relatively low wages lead to high staff turnover…low status and social image."

Also in Croatia there are only 12% with specific University degree. High seasonality of demand leads to a large pool of seasonal workforce, "often less skilled, underpaid and poorly motivated…unfavourable working conditions…large migration of seasonal workers…" According to the focus group discussion, in Croatia employers "periodically employ all those who need a job…from students who need a temporary job to older people who cannot find work to uneducated individuals who agree to work at very unfavourable terms".

In the Azores (PT) focus group discussants describe that low qualified employees are mostly older inhabitants of the island who work in tourism as a result of low competition. There are neither other jobs nor do many people compete for the jobs that are there. Some of this group is described as "full of vices and not available to learn."

Also in the MINHO region skills and motivation is reported to be "low".

In Turkey the participants claimed that while there are good education opportunities in the sector, many new restaurants and hotels are opened by people without tradition in the sector, who regard tourism as a mere investment opportunity.

Also a look at the results of the SME survey substantiates the impression of a sector with a lack of actors genuinely committed to tourism:

Only 11,2 % of respondents have a non-university tourism specific training and 13,5% have a tourism specific University education.

In the sample surveyed, substantial problems to hire staff with exactl ymatching profiles, is clearly evident. Only 16,7% of respondents claim that they can "almost always" find adequate personel.

Just under a third seems tob e more or less satisfied, while more than 50% say that it is „sometimes" hard (40,4%) to find the right people, or even claim that they almost never find these (11,2%).

The motivation problem becomes most apparent in a free format answer of the SME survey. Respondents were asked to describe what they think attracts their emplyoees to work for them. This question was meant to reveal the self perception of the employers with regard to the most important factors which need to be there to be an attarctive employer. It also reflects the perception of the employers of the main motivation of their employees. The free format answers – multiple answers were allowed, were clustered into seven main groups: Salary, working conditions, Work Schedule, reputation, training opportunities, good team, attarctive content of work and other.

In Croatia, salary and working conditions are mentioned eight times each. Four times the repuation of the place is described as an important factor and two times the attarctiveness is built on a good team.

Also in Portugal the salary predominates as an motivational factor. It is mentioned 11 times.Other factors include working conditions (6), attarctive work content (5), good team (4), reputation (3) and training opportunities (1).

In Romania the motivation through the salary is less apparent (3) and general "working conditions" (10 are more often mentioned. Other factors as the work schedule (5), reputation (4) and "good team (4) also seem to be important. Only 2 employers mention the attractive content of work.

In Turkey the importance of the salary (17) predominates. Almost all of the resondents mention this as the most important factor.Others include the working condition (7), good team (3), training opportunities and schedule (2 each) are also mentioned. Only 1 employer mentions the content of the work.

For the external observer the low number of mentions of the content of work as main motivational factor is striking. These answers seem to suggest that employers in fact perceive an absence of professional pride and commitment to the profession in their employees. To them, their employees seem to be motivated by money alone and rarely "love" to be a cook or to service customers.

Therefore there seems to be a lack of intrinsec motivation.

This lack of genuine enthusiasm and commitment is further substatiated by the ranking of learning needs according to the grid of the eight key competencies for life ong learning.

Also here competencies determined by motivation and attitude are the most prominent.

An employee genuinely enthusiastic would love to communicate with customers to be of service and to show his/her care and good work. This seems to be only rarely the case today: "communication with customers" is ranked as the most relevant competency.

Next to it good manners and the ability to show a positive attitude comes next.

"Ambition and willingness to learn more" is next "interact and adress needs of customers and treating every customer as if it was the employees own business are also among the 6 most frequently named competences.

Obviously the perceived relevance mirrors what the mangers miss most in their employees.

Not surprisingly respondents, next to the general market situation, rank "Qualification problems" as the main "pressing problem".

This is in spite of training systems which are quite elaborated and provide sufficient education, training and learning opportunities for all needs.

As far as partners report from the focus group sessions as well as in their on remarks about the results of the survey, formal training opportunities can not be equated with a good state of qualification in the sector.

Reasons reported include that graduateds from these institutions end up emigrating to countries with better working opportunities, as is the case in Romania, or refuse to integrate into the social system of the hotels and restaurants, as they want to work in a management position from day one, which is on the one hand already filled by the owner/manger in these often micro sized businesses. Often reportedly these graduates lack experience and practical skills in spite of good theoretical knowledge. Educational institutions have, at least this is the consensus in the focus groups, a reputation of disconnection from the world of "real" work, at least in the case of Romania and Turkey., but to a lesser extent also in Croatia and Portugal.

Formally trained applicants therefore are not necessarily the first choice of employers. The kind of education and training offered by many institutions seems to rather widen the gap between companies´needs and qualification patterns, rather than closing it.

Employers in all of the partner countries therefore end up with a labour force which is rarely formally qualified in tourism, often with a low motivation, with limitations in general attitude and communication skills and entrepreneurial spirit.

From the reports received the impression is that 80% of employees in tourism in the partner countries regard their work as a "job" rather than a profession or vocation, to which they are committed and on which they base their plans for the future.

For the project target group of low qualified employees this could mean that these, who fill the more basic jobs in many Tourism SME in many countries, are crowded out in the partners countries by a over supply of people with a good education and therefore with broad skills that allow them to fill positions with limited skill demands quite easily, even if they are not fully engaged.

This leads to an effect of "crowding out" people with lower educational attainment, thereby limiting the employment chances for these. Obviously Tourism SME try to avoid the costs of training lower educated applicants by hiring not very motivated but nevertheless somewhat flexible and educated candidates from colleges and Universities in search of a "job". Many hotels and restaurants do complain about the low motivation and high rate of fluctuation of these, however they obviously have not considered the thorough training of applicants with lower educational attainment as an alternative.

As experiences in other countries revealed , the latter option can be a way to develop a loyal and motivated workforce.

 It is remarkable that the SME surveyed are in fact obviously quite successful. Many of them exist for more than ten years, if they wouldn´t, wouldn´t they master the business.

Also 83%/63% of those answering the question, report excellent or good ratings on the relevant internet portals, indication a quite high satisfaction of customers, which often are international customers.

This obviously is only possible because of the good intellectual capacities and adaptability of the well educated emplyoees that form the workfore, combined with a quite high intensity of training and learning at the workplace taking place. The chapter to follow will look into this.

2.1.3 State of the Art of Training and Workplace Learning in Tourism SME

As the application claims "Adapting tourism activity to globalisation and new market demands … will require additional efforts to improve the professional skills like IT, meeting customer expectations, flexibility and responsiveness.

The acquisition of professional skills relies on the creation of learnability, i.e. the ability to learn.

The 8 key competencies for lifelong learning (EC (Recommendation 2006/962/EC) give a framework of the necessary competences to acquire.

Acquisition of these key competencies will make employees more productive in itself, but is also a prerequisite for further, more formal training. Here the role of the SME managers is fundamental. They must play the role of coaches/mentors supporting the process of skills development of their workers.

Having in consideration that also the managers of these Tourism SMEs (small hotels, restaurants and catering) are very often lacking the basic skills on good communication and on using foreign languages necessitate to apply the process of empowering to the self-development of the managers themselves providing them the coaching/mentoring competencies in order to put them in practice with their own staff."

In how far can these claims/hypotheses be substantiated by the research implemented?

As already mentioned tourism in fact becomes more global also in the partner countries.

Brasov/Romania attracts many international tourists visiting Bran and/or Bucharest. In Turkey the number of incoming guest from abroad rose by more than 35% in recent years, Azores attract also a growing number of international guests, as does Croatia a traditional destination for bathing and nautic tourism, with a capital that is just about to become a destination for international travelers in its own right. Only the MINHO region in Portugal claims to be an exception, albeit an exception with high underused potential for international tourism.

Intercultural competences, dealing with international tourists and foreign language competences are among the learning needs mentioned by all partners, therefore.

The hypothesis can be regarded as verified therefore.

Further on the application claims that "learnability" is a prerequisite for learning of specific skills. As discussed in the previous chapter, desk research, but also the Focus Groups and the SME survey revealed that factors of attitude and motivation are regarded as the most relevant, but also most problematic factors.

Specific skills are less important. Also this hypothesis seems to be substantiated by the findings.

What about the key role of managers, then? As mentioned the success of the SME in spite of the qualification and motivation problems identified, points at the fact that a good measure of learning and training already takes place in the hotels and restaurants in the partner regions. As the kind of formal education provided in schools and Universities is assessed rather sceptically by the respondents, obviously the in-company, workplace learning activities are those who are of critical importance for the success of the hotels and restaurants.

Here the manager is in charge, which substantiates the original hypothesis.

What did the partners learn about these training and learning measures?

If we look at the quantity of learning reported, the numbers are quite impressive.

Almost 50% of hotels and restaurants claim that more than 20% of working time is devoted to some kind of learning, with a quarter of respondents even reporting a ratio of more than 30%.

Obviously the respondents have a good awareness of the work situation as a learning situation. The numbers are the highest for Portugal, while Croatia obviously relies on more formal forms of training with almost 95% of companies reporting a rate of less than 20%.

What, according to the understanding of the respondents does this learning cover?

Respondents report for the case of Croatia training of employees by the manager as the most common form of learning. Also transfer of knowledge from experienced to unexperienced workers is mentioned. Courses are mentioned only 3 times.

In Portugal the respondents emphasize that they meet the legal requirement of 35 hours of training a year as a minimum standard. Also here the manager trains employees, as the more experienced train the junior employees. Specific skills as accounting and languages as well as customer communication are mentioned. Obviously also these are covered by in-company training.

Managers as trainers are also common in Romania, where formal courses are mentioned more frequently than in the other countries, however.

In Turkey meetings (daily, weekly, monthly) as a means of learning are mentioned most frequently.

In the focus group in Croatia the importance of informal learning particularly for "problematic" groups (as early school leavers, frustrated students, etc.) is emphasized, substantiating one of the project´s main claims.

In Portugal participants affirm that "majority of companies practices very little formal training" and "informal training is very dominant". Interstingly, experts in Portugal claim that the "soft skills" are those hard to develop and missing, while specific skills can be easily acquired through workplace learning.

Also for the MINHO region "a few vocational training courses" are reported, along with "excessive individualism" in training.

In Turkey the findings of the survey are affirmed: meetings and ad hoc instruction is the most common form of learning.

In Romania more formal learning is mentioned, but the main point emphasized is that employees are "willing to learn, with the condition that the training is presented as attractive by the manager and that the training takes place during work hours. …The manager must take the initiative."

On the whole the research affirmed the claim that managers are in a core position to initiate, motivate and organise workplace learning. This learning takes place already to a quite high degree.

However, the relatively succinct description of the activities indicates that these learning takes place to a large proportion as a more or less spontaneous, unplanned and unmonitored ad hoc activity.

While this is better than nothing, further inquiry during the project should identify potential best practices of such learning, as instruction of specific skills, systems for effective group meetings etc.

A systematic but informal system of training within companies which leads to a modular acquisition of all necessary competencies on the side of the employees and would match all qualification needs of companies on the other side, is not documented at this point.

Therefore the claim that there is a lack of systematic and targeted learning efforts is verified in spite of the relatively high quantity of learning.

Also the question of the quality of the training/instruction remains open. While for sure the practical experience of all of the owners/managers and the good academic education of some of them must be regarded as an asset, this experience can also be misleading, if there are no provisions to evaluate this experience in the face of new developments like globalisation, new customer demands, changing markets and living styles as sports oriented customers, vegetarians, senior tourists, to mention only a few.

At this point there is little evidence that these trends are analysed in a systematic way in the TourismSME and that qualification needs are deduced and systematic qualification measures implemented.

Quite to the contrary, in one case "excessive individualism" is described as an inhibitor of such learning.

Nevertheless the current practices can be a good starting point on which to build more systematic and comprehensive approaches.

Can such efforts build on an already well developed support nework for Tourism SME? The next chapter will look into this question.

2.1.4   State of the Art of Support Structures

The application claims that in order to "have a systemic approach it is also necessary to develop the profile of the trainers/coaches that normally work with Tourism SME in order that they are able to implement the new learning concepts.

These new consultants (facilitators),must introduce Tourism SME owners and managers to new methodologies and at the same time be coaches/mentors of the SMEs managers working with them and supporting their empowerment to establish these kind of development strategies for their companies and for the sector. "

Therefore partners studied the kind of support structures which exist in their areas.

As a result it can be summarised that quite a lot of institutions, administrative bodies and educational and training institutions take care of the Tourism sector.

In Croatia a list of 11 kinds of supporting institutions is mentioned, ranging from the ministry of Tourism to private training providers. The correspondent claims that all of these services are in demand.

The partners in Portugal emphasize the role of "Tourismo de Portugal" which is the leading organisation in the sector. In addition to this public body organisations like schools and training providers offer training , which "can already be defined or structured according to SME´s needs".

In Romania the National Tourism Authority is mentioned in its role as "authorising" and "inspection" unit. In addition prvate associations are mentioned, as the national association of rural ecological and cultural tourism, the natioanl association of chefs and confectioners and the association of travel agencies.

A similar list as in the other partner countries is reported from Turkey. Also here services are in demand.

While partners claim that the services provided are in demand, there is little evidence of the impact of these services at company level. Obviously they are the providers of the quite few formal training and development measures that are reported.

There is no evidence however, that systematic activities on a larger scale for the support of informal competency development exist or are implemented at this time.

The topic of the project remains relevant therefore and it can be expected that the results and products will also be relevant for these organisations.

Therefore also this element of the framework of causal factors can be regarded as substantiated by the research implemented.

Last but not least: while the relevance and rationale of learning has been established in the prior chapters, how important is the whole topic for the companies? How does it relate to other challenges and how high on the list of priorities is the topic as a whole? The answer to this question will determine the level of attention that can be expected for the project from the side of the target audiences.

2.1.5   Priorities and Challenges for Tourism SME – How important is "Learning" for them?

When asked for their "most" pressing problems, TourismSME mention other problems rather than personel development at roughly the same rate. Among 81 mentions for the most pressing problem infrastructure and buildings are mentioned by 13,6%, taxes and state policy in general by 12,3%.

The "general market situation" is the biggest concern, mentioned by 28,4 %.

Nevertheless, an astonishing number of respondents mention staff and qualification related concerns as their no. 1 priority.

Categories include "Qualification problems" (14, 8%), quality problems (3,7%), recruitment problems (6,2%) and "motivation and fluctuation of staff" (4,9%).

Therefore a high interst in the project can be expected from the side of the SME, which is also reflected in the high turnout of the survey.

Also from the side of the focus groups a high level of interest in the project is mentioned, as "the atmosphere during the focus groups was excellent…most of the invitations were accepted" and the discussion topic was regarded as "highly relevant".

As the participants in the focus groups mainly belonged to supporting structures, also here the relevance of the topic is validated.

2.2 Conclusion 1: Main Areas of Learning for TourismSME Managers and Employees and Main Requirements for Pedagogical Approaches and Material

2.2.1 Conclusions from Research

According to the findings of the initial research main learning needs for SME employees are covered by the eight key competencies of life long learning.

Among those, competences of general attitude, communication and entrepreneurship stand out. The research results summarised in the prior chapters suggest that qualification problems and gaps in TourismSME in the partner countries are not primarily related to a weak initial education or a generally low level of academic achievement.

Rather the sector suffers from a high proportion of employees (and probably also managers) for which the hospitality sector is not the "first choice", but rather just the only available option to make some money.

Low motivation in general and a lack of enthusiasm to develop the necessary competences to perform on the highest level are an effect of this fundamental situation.

Since this results in a low level of productivity, low wages and a high fluctuation of staff, along with limited career opportunities a weak image of the sector as a whole follows and a downward spiral of limited expectations and limited efforts from all sides follows.

As the research revealed this perception of the sector is quite counterproductive, as there are also big opportunities in the sector in all of the partner countries.

A coordinated effort to develop the professionalism of the sector to the highest international standards could help to use these opportunities.

As a consequence commiting oneself to the sector and developing individual competences in a way that takes its measure not from the deficient status quo of "just enough", but from the standards in the main competing markets, could effectuate huge individual opportunities.

These will be used, however, only if such development is encouraged by a pay that reflects the talent, effort and individual productivity, rather than the common present standard.

Also career opportunities must be made a reality, be it career pathways within the regional sector, be it in the encouragement of entrepreneurship. Excessive individualism must be overcome and collective skill formation for the sector must become the norm.

The learning programm and supporting material for employees should therefore focus on:
Motivation and sense-making: discovery of the tourism sector as a attractive and worthwhile sector of employment and an attractive career opportunity.

Development of a individual competence profile matching the tourism sector:
- pro-active attitude,
- positive thinking,
- good communication skills with people from different backgrounds,
- sense of pride and ownership of one´s own work,
- service mentality,
- problem solving and situational flexibility,
- long term commitment and systematic skills development.

In this sense, the aim of the learning must focus on the key competence no. 7 "Sense of initiative and entrepreneurship ". It must be learned that work in tourism can

deliver in all positions, what the Croatian partner reports as motivation of owners and executives in tourism:

- "Taking control of their own destiny
- Recognition in society
- Doing work they like
- The possibility of exploiting their potentials
- The ability to change things
- The need to realize ideas
- Financial awards"

The material developed as well as the consultancy delivered and the guidance by mangers should emphasize, that work in tourism can be a pathway into a sustainable career, that work in tourism must not be one with a bad image, but one that is respected because of the quality of the services delivered. In times when chefs are celebrated stars of international TV shows this argument should be easy to make.

Moreover work in Tourism is in fact likable, as it allows for interaction, receiving feedback, takes place in attractive places etc.

Work in Tourism can be challenging and for sure providing excellent services to an internationally accepted or even benchmark standard in Tourism is not easier than in other fields of employment. Therefore also here, almost each individual talent can be developed to the fullest. One particular advantage of the Tourism industry is also obvious in this context. "Realising one´s own ideas" and the "ability to change things" here is a very realistic perspective, as high performing employees are in demand, because of the generally low standards of performance, but also starting one´s own business is not out of reach, as the investment in this industry is lower, compared to other fields.

Such entrepreneurial employees may be a challenge also for the owners. The quality of a business shows in its ability to retain the excellent, not the weak, however.

As such skills cannot be developed from studying e.g. the "theory" of these attitudes and "soft skills", it will be mainly the methodology of learning which can be expected to develop these competences.

Therefore, in a somewhat paradoxical way, it will be exactly the development of specific skills, which will effectuate the development of more general competences.

As a result of prior studies and projects a more reflective and systematic way of working and constant improvement of work processes can effectuate an improvement of multiple factors, as concrete professional skills, as e.g. cooking techniques, room making, serving etc., through the systematic discussion of the work processes in the respective areas, the identification of quality gaps or quality standards to achieve or other aims for learning.

The discussion of learning pathways for achieving such learning goals will enhance the awareness for learning opportunities available at the workplace as well as the awareness for additional learning arrangements that might be needed.

In all cases a pro-active attitude and targeted communication will be needed to arange such learning. These soft skills and/or meta competences can be improved more effectively, if they become a topic of reflection.

Learning arrangements and learning materials should therefore encourage the reflection of questions like:
- In which way have I demonstrated a pro-active attitude in this XY work process?
- In which way have I been aware of the needs of my customer and what have I done to identify these needs?
- What have I done to communicate my enthusasm to the customer?
- How can we work together to best meet the customers needs?
- What arrangements of work planning do we need to identify problem areas and solve problems identified?
- What are my individual goals and visions? What do I want to be able to do in 5 years?
- What do I need to do to achieve this?
- What will be my first step?
- Etc….

The learning material to be developed should adress such learning based on development of soft skills and meta-competencies in a holistic way. It should describe **a process of identifying the developmental goals of companies and employees alike** as well as **a process of matching those goals** where ever possible.

As in fact the manager is in charge of shaping the working as well as learning environment, of making the strategic decisions and of determining the individual job profiles, tasks, duties and areas of self-responsibilities, as well as the "hard fact" of hours, payment and promotions, the approach and material must put the manger at the center of the process.

The approach and material must include instructions and supporting material (as templates, checklists, theoretical input, example schedules of sessions etc.) which allow the manger to

- Identify the core mission and USP of the hotel or restaurant
- Become aware of strengths and areas of excellence
- Identify development goals
- Deduce learning goals for the company from them
- Identify individual strenghths and fields of development
- Plan measures of individual and company learning
- Monitor and evaluate the learning process on a continuing basis
- Produce company and work process specific learning material (e.g. defining and explaining individual work processes)
- Work with peer companies and supporting structures for competence development

Material for consultants should include theoretical background and concrete material (as checklists, templates, work-sheeets, examples of consultancy sessions etc.) to support mangers in setting up such a company specific learning system.

The material should take the results of the TourismSME initial research results into account and also build on the results of related projects, which should be adapted and further developed in a way that they fit the Tourism sector in the partner countries.

The material should be based on the experience of the consultants involved in the focus groups, along with the material from the projects cited (as additional ones, as identified in the desk research). The process of developing the material should define a process of integrating this experience.

For employees criteria for the material to be developed include:
- Development of soft skills and key competencies not in abstract, but through targeted reflection of concrete workplace learning and quality development
- Short and relatively simple design of the material
- Group learning and employee interaction whereever possible
- Exercises should necessitate the demonstration of pro-activity, good communication, planning skills, etc.

They should necessitate reflexivity in planning and implementing concrete work, as well as evaluating its outcomes. The ability to explain individual work processes with regard to the reasons for a certain methodology etc. should be emphasized.
All individual steps should encourage a higher level of commitmemt and ownership of the work process and at the same time have concrete effects on the quality and productivity of work.

2.2.2　Conclusions from the Discussion of Research Results in Partner Meeting Ankara June 2015

The research results as well as recommendations given in the draft version of the report as hand as well as the presentation of results by IO 1 leader ISOB have been discussed at the occasion of the second partner meeting in Ankara with the participation of all partners.

The discussion focused on the content the facilitators/consultants of TourismSME will have to stud yin order to being able to meet the TourismSME´s needs as identified in the research phase.

The partners concluded that the content to follo needs to be included in the material for the consultants:

I. a. Value of workplace learning

- General concept of facilitation of WP learning
- external (consultant)
- General facilitation methodologies
- Listening skills
- General attitude
- Knowledge of method of wp learning
- Etc.

b. Different roles in working with the clients (coach´, mentor , facilitator, expert, process guide,…..)

c. Thoughts about explicit/implicit selection algortithm for selecting consultants…

Role of the internal facilitator (manager)

d. Theoretical background: e.g. appreciative inquiry

II. Define „standard process" for introducing workplace learning in TourismSME (plan-act-do-check　　> repeat

The material for consultants should suggest a standard process for working with TourismSME in order to aid a targeted and efficient implementation, combining flexibility with a systematic and reproducible approach.

As an example of such an approach the discussion identified the structure used in the project SOCIALSME. Also the project HOTSME used defined workshops and sessions to organise the learning.

Individual steps identified by the partners included:

- Getting to know the company
    - Questions to ask
    - Feedback
- what is the vision of my hotel/restaurant?
- what has to change to achieve that?
    - pro-active attitude,
    - positive thinking,
    - good communication skills with people from different backgrounds,
    - sense of pride and ownership of one´s own work,
    - service mentality,
    - problem solving and situational flexibility,
    - long term commitment and systematic skills development.

Theoretical Background II : 8 Key competencies for Life Long Learning: what is their relevancy and specific content/meaning in Tourism: Think about it!

- Planning implementation
    - Define learning needs
    - Define pilot projects/learning areas
    - Planning interaction with employees
    - Work and learning assignments
    - Feedback discussions
    - Individual learning, making use of learning material
    - Individual reflection of results
    - Competence review
- Review on company level
    - Results and next steps
    - Sustainability of results and organisational development
    - Other lessons learned

All individual steps should be illustrated with a description of typical situations and learning challenges in TourismSME.

III. Problems and Barriers to Learning

- Thoughts about: „change is hard" (exercise)

- Individual inhibitors (bad experiences, prerequisites…)

- Arguments for: how to overcome that?

The meeting discussed results of prior EU funded projects which developed methodologies for workplace learning and consultancy methodologies to support such learning. ISOB in particular presented material from the projects Compserv, HOTSME, SocialSME and KEYCOMKIT.

Partners agreed that results from these projects cannot be transferred/applied in the context of this project 1:1, but should inform the development of Tourism specific material by the IO 2 leader.

The IO 2 leader will review the material, reflect the relevance for Tourism, introduce its own Tourism specific expertise and make a suggestion for a structure of the material for consulatnats as well as suggest an outline of content and format.

The other partners will add their own contributions and feedback.

2.3 Conclusion 2: Profile of Consultants Implementing the Learning Methodology

2.3.1 Reflections on Methodology of Consulting and Consultant´s Profile from Research

Based on the findings of the research summarised in this report, some experiences from prior projects seem relevant also for TouriSMEComp. Among them is the general approach to work for the target group of employees through working with and developing the responsible manager

This set up takes account of the fact that the general strategy of the company and in company learning should be a part of his general strategy of the TourismSME and not an add-on isolated activity. This integration is the responsibility of the decision maker in the company. This does not mean that employees will be excluded from the

process. Quite to the contrary managers will be guided towards including employee's views and visions for learning activities and strategies as much as possible.

Nevertheless prior projects as well as the core importance of mangers that has been revealed through the TouriSMEComp research, suggest that owners and managers themselves must take the responsibility for competency development. Competencies are a core asset of any company and therefore should never be viewed as an external concept introduced to the company by consulting an isolated group of employees who cannot make decisions. This would contradict competency development as a strategic activity.

Therefore the roles are:

Consultant: Coaches a pilot group of owners/managers in strategy building and implementation.

Pilot group: Takes responsibility for the process (process owner), builds strategy, discusses and implements strategy with employees

Employees: Work with decision makers in planning and implementing learning activities

A note for consultants on the consulting mind-set: Consulting and the method of appreciate inquiry.

The research presented revealed that TourismSME already implement a multitude of learning activities in order to compensate deficits of formal learning as well as to meet individual skills needs of the respective company.

Therefore a general approach of consulting should be used, which takes this already high level of activity into account. One such methodology that has been proven as useful in such a setting is the methodology of "appreciative inquiry".

The field of developing learning strategies in TourismSME is at least as much one of exploring and adapting current practices as one of implementing them. As a consequence it is very important to choose methodologies that allow for the inclusion of the company's own understanding, activities and approaches of appropriate learning activities as much as inspiring them by giving new input.

More important than imposing pre-fixed concepts on competency development will be to provide the necessary inspiration to companies and consultants. What consultants

can do is inspire others to generate ideas, to keep being innovative, and to operate in harmony with the dynamics of the business environment, which is a continuous journey.

Specifically in micro-enterprises with very limited resources and a limited range of possible activities it is very important not to confront these with an intimidating list of learning fields and skills and competencies to develop in an "audit like style". Much more the present activities should be taken as a starting point; desirable improvements and new fields of activities should be defined and prioritized. It proved to be advantageous to keep the process is as open as possible content-wise and to leave a quite wide latitude in filling it with activities of different complexity.

As a general orientation for the desirable approach of the facilitator the concept of appreciative inquiry (ai) proved useful in guiding SME. Appreciative inquiry or „appreciative process" , developed at Case Western University in the USA in the early 1990s, is a form of "action research" and organisational development methodology that attempts to create new theories/ideas/images that aid in the developmental change of a system.

The key change method is to rather pay attention to what you want more, than to paying attention to problems.

This reflects the ancient insight of psychology "that you get more of what you are paying attention to".

Corresponding techniques of change are „tracking" and „fanning". „Tracking" constantly looks for things that an individual or organisation wants more of, implying that this thing is already there, albeit in small amounts. „Fanning" describes the action that amplifies and encourages what is looked for.

The proponents of the theory however warn that an indiscriminate use of the term might corrupt its content. They especially warn that the discussion of tensions and deficiencies has to have its place in the conduct of organisational change. So appreciative inquiry is not just „stressing the positive", but is open to a balance between appreciation and critical thought.

One important premise remains important: on the basis of the theory of the social construction of reality the basis of appreciative inquiry is the „heliotrophic hypothesis" i.e. the claim that

„social systems evolve toward the most positive images they hold of themselves."

Often, to consultants used to being critical and giving corrective feedback, this image is contrary to accumulated evidence of the contrary. So some degree of patient trust in the method is beneficial.

Appreciative inquiry tries to find, also in otherwise dysfunctional, frustrated and conservative organisations, at least micro-moments of peak performance in the desired dimension that can make them ready to be open to new desires and opportunities. To talk about such moments is the anchor to further develop these moments. The value is that doing so will demonstrate that the desired dimension is not something alien to the organisation, not fitting its structures and capabilities, but that it is already there, ready for further development.

This changes the perception of reality within that organisation and makes it open for development. The desire for further analysis may arise and as a consequence also problems might become discussable that had been a taboo before.

The rationale for this approach was the experience, described by many consultants for organisational development, that often, seemingly hard headed inquiries into problems and deficiencies within an organisation are started, but the results are often frustrating. Such inquiries often mobilize the "immunisation system" of organisations against change instead of promoting change.

Confronted with their own deficiencies most organisations react with defensive strategies against change because it is hard to acknowledge deficiencies and failures out of fear of appearing incompetent or disloyal, finger-pointing starts and the social balance of the organisation can falter. It can therefore be concluded that the standard method of consulting and organisational development seems to be an even more risky experiment than innovative approaches.

Confrontation with the reference system of externals often puts organisations on the defensive. Especially being confronted with consultants to whom they attribute a higher competency, can put the organisation or at least many of the people within it, psychologically to the defensive. They feel judged and criticized instead of consulted. In summary, problem-focused techniques often are "painfully slow, rarely result in new vision and generate defensiveness".

A more open, appreciative approach in contrast allows for the formulation of new theories, ideas and images in the language of the people within a particular organisation.

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This insight, according to the results of the TouriSME research seems to be particularly appropriate, as many of the companies surveyed obviously have smaller or larger areas of excellence, as the positive ratings on the relevant internet portals show. Therefore it is already demonstrated that any development activities can build on good foundations, which should be emphasized rather than negated by comparing the status quo to an anonymous "ideal situation".

By starting with positive practices already in place, i.e. the affirmation of something that is already good and the formulation of plans to expand these positive factors lead to much greater identification of people with new ideas. The immune system is not alarmed and actors feel comfortable enough to participate more willingly.

This allows for the construction of a more positive image of the organisation of itself, which then forms the standard against the actual practices can be held.

In starting with positive practices appreciative inquiry, trying to influence the open, but also the „inner" subconscious dialogue in the organisation, tries to change the "stories" that are told in the organisation about itself. The aim is to bring into accordance what the rational mind of the organisation wants to happen with the inner dialogue within the organisation.

Every attempt to change what happens within organisations has to start with trying to influence what is talked about and what is appreciated in the specific organisation. Elliot, from the background of a multitude of development processes using ai, defines four typical stages of the process:

Discovering periods of excellence and achievement: Through interviews and storytelling participants in the process remember past achievements and points of excellence in the field discussed. What happened to make those achievements possible?

Dreaming an ideal organisation or community: People use past experiences of excellence to envisage the desired future. Unlike abstract strategic planning these visions are based on the positive present that the organisation seeks to expand, to strategically expanding the organisations´ demonstrated potential.

Designing new structures and processes: In this stage through consensus concrete short- and long-term goals are developed. Proactive propositions should stretch an organisation, but they should be achievable because they are based on existing points of excellence

Delivering the dream: People act on their provocative propositions, establishing roles and responsibilities, developing strategies, forging institutional linkages and mobilizing resources to achieve their dream. People will have a better understanding of the relevance of new initiatives in respect to the long term vision of the organisation.

Approach to be used in TouriSMEComp should reflect these considerations.

Requirements for Consultants

The concepts to be developed in TouriSMEComp are intended for consultants from organisations, which are active in training and consulting SME. These can be consultancies, business associations or universities. To be able to facilitate the concept the consultants as individuals and/or the organisations as a backup should meet a couple of criteria.

They should:

- have at least a basic knowledge about the concept of workplace learning and the basics of the discussion of the concept (pros and cons);
- be aware of the peculiarities of small and micro businesses including a knowledge of their day to day business style and resources;
- be aware of possible obstacles but also specific opportunities for workplace and informal learning stemming from the business style of SME;
- have some credibility among Tourism SME either as representatives of business associations or from successful previous cooperation;
- be able to communicate with SME in the language of SME (owners and managers);
- be aware of the business case for competency development, including some real life examples that will be convincing for the specific Tourism SME;
- appreciate the most simple and inexpensive measures that provide the best cost-effect ratio for the company;
- ideally already be involved in interaction with the business, so that the issue of key competency development can be raised as a solution to real world problems;
- have an overview of other learning resources apart from this concept, specifically regional and sectorial resources;
- be able to accompany the SME flexibly regarding time and place;

- Be aware of the concept of business and regional networking and willing to encourage networking on the issue of key competency development. Mutual support is one of the most powerful resources of SME;
- be open to the individual motivation of SME owners and managers for key competency development.

Last but not least they should be no tool or concept "freaks", who put their concepts and approaches in the centre of interaction. Concepts are like streetlights. They light the way, but only drunks cling to them.

Among the behavioural requirements to be highlighted the ability to „trust the process" is notable. Judgement on effects should be suspended until the end of the process. This trust in the process seems especially important in face of prejudices against seemingly complex tools and methodologies.

As already mentioned it is also very important to be able to act in a flexible manner in applying the tools. The use of the different steps should be adapted to the specific needs of the companies, making obvious that also seemingly complex process and instruments are a sequence of in fact very easy to handle single steps.

Interrelated with this is the patience of the consultant in dealing with the impatience of managers that is an inhibition to systematic processes and forward planning. Flexible but persistent facilitation of the process can establish more systematic working methods.

The consultant should on the other hand be also open to new ideas from the companies, and be ready to integrate them into the process. This is the only way that allows the instrument to be really accepted and the power of the tool integrated with the innovative ideas as well as well-founded traditions of the respective businesses. Using this approach new experiences will be made and practices developed that can be useful in other settings also.

In this context, the listening skills of the consultant are important. Without the ability to understand problems and their causes and be open to solutions by really listening to the client, the process will only lead to mediocre status quo solutions.

Don't overuse instruments! A good consultant knows where to stop. This warning is directed at „tool enthusiasts" eager to employ the technically perfect tool in a way inappropriate in the situation. The tool that is force-fit gets a bad name because it doesn't add value.

Different perspectives of clients should be valued, not simply tolerated, since in the end the client is the owner of the process. The art of counselling clients however is, that nevertheless the consultant must care that the focus is on results and solutions. Aimless „learning experiences" are simply not tolerated by SMEs that are mostly short on resources.

2.3.2   Partner´s Discussion of Consultant´s Profile and Selection Criteria

Based on the research results referred in the prior chapter partners discussed the consultants profile and the criteria for the selection of consultants in their partner meeting in Ankara.

As a result the list of desirable characteristics to follow has been defined:

- WANT to be a consultant and develop consultancy skills – see benefit for him/herself
- Know English to be able to participate in Learning Experience
- have at least a basic knowledge about the concept of workplace learning and the basics of the discussion of the concept (pros and cons);
- be aware of the peculiarities of small and micro businesses including a knowledge of their day to day business style and resources;
- be aware of possible obstacles but also specific opportunities for workplace and informal learning stemming from the business style of SME;
- have some credibility among Tourism SME either as representatives of business associations or from successful previous cooperation;
- be able to communicate with SME in the language of SME (owners and managers);
- be aware of the business case for competency development, including some real life examples that will be convincing for the specific Tourism SME;
- appreciate the most simple and inexpensive measures that provide the best cost-effect ratio for the company;
- ideally already be involved in interaction with the business, so that the issue of key competency development can be raised as a solution to real world problems;

- have an overview of other learning resources apart from this concept, specifically regional and sectorial resources;
- be able to accompany the SME flexibly regarding time and place;
- be aware of the concept of business and regional networking and willing to encourage networking on the issue of key competency development. Mutual support is one of the most powerful resources of SME;
- be open to the individual motivation of SME owners and managers for key competency development

While some of these characteristics will be strengthened during the consultants training, others are a prerequisite for participation, as a good understanding of English, in order to being able to take part in the discussions in the workshop.

Partners emphasized that the program for consultants (handbook and learning experience) is not intended as a beginner level consultancy or facilitation training.

The program is intended for participants with good proficiency and/or some background/training in consultancy.

The program and handbook are intended to facilitate the application of these competencies in the specific field of tourism, focus on workplace learning and introduce the specific methodologies and material developed in this project.

The learning experience can be opened for participants who lack prior formal training or experience if the respective partner deems the participants as particularly desirable and having a very high motivation and ability to learn the fundamentals of consultancy and facilitation in another context.

The focus and topic of the workshop should be clearly communicated in any case.

As a consequence of these reflections partners discussed the content of the learning experience for consultants which will take place later in 2015 in Brasov.

Elements of the program will be:

Aim:
- Get to know content of handbook,
- exchange experiences,
- agree on core consultancy approach
- (NOT basic training on facilitation, consultancy, communication etc. …)

Participants:

- Match consultants profile
- (prior experience and/or high interest in becoming consultant/facilitator, willingness to read/learn additional material)

Roles:

- Gazi/FPIMM: general facilitation of workshop
- Partners: Presentations of individual inputs (to be decided according to dev of handbook), facilitation of thematic sub-groups
- Input of individual experiences and practices

Structure:

- Input on parts of handbook
- Discussion
- Exchange of experiences
- Decision about approach/what to do in pilot

3. PART 2: DOCUMENTATION OF RESEARCH RESULTS

A synthesized documentation of partner´s research results, as documented by them in desk research reports, focus group minutes, survey results and comments on these, follows.

3.1 Inquiry by Partners: Focus Groups

3.1.1 Participation in Focus Groups

As recommended by the Methodological Guidelines, the desktop research on the situation of SME in tourism in the partner countries has been complemented by direct contacts with experts and target group representatives. This exercise was intended to verify the findings from research by direct dialogue. This was important especially because the research on tourism activities in some of the partner countries focuses

mainly on bigger companies. The direct dialogue was also an opportunity to disseminate the approach of TouriSME and to test the interest in cooperation in the development of the TouriSME products among potential target groups.

The results from this research can build on a quite big sample of dialogue partners.

On the whole 116 SME representatives, consultants, and experts as potential facilitators worked with the partners in the interviews (90 respondents) and focus groups (26 participants). This turnout shows a high level of interest.

The results of the interviews will be discussed in a separate chapter.

Regarding the activities in the focus groups, in Romania 50 SME were contacted, which resulted in a selection of 7 individual focus group participants. In Croatia 6 participants discussed the topics. In Portugal in the region of Azores 5 experts and SME representatives shared their views, while in the region of Viana do Castello a Focus Group of 5 SME representatives shared valuable insights regarding the situation of the tourism. Turkey contributed the high quality feedback from 5 high level experts on SME.

Here are the main issues discussed, as documented by the partners.

3.1.2   General Situation of the Regional Tourism Industry

Croatia

The city of Zagreb, capital of Croatia, on the historic and political threshold between East and West, illustrates both the continental and Mediterranean spirit of the nation it spearheads. Zagreb is the cultural, scientific, economic, political and administrative centre of the Republic of Croatia, with a population of nearly one million, contains almost a quarter of the entire population of Croatia. Over the centuries, the city was inhabited by people coming from all over Europe, and in recent years, by people coming from different parts of Croatia, ensuring a rich cultural life. In Zagreb tourism has been developing faster than in the rest of continental Croatia, Zagreb is taking advantage of its location and transportation hub for the rest of Croatia. A large increase in accommodation services particularly hostels was registered in recent years

as well as the constant growth of overnight stays. Zagreb is not just a passing standpoint to the locations on the Adriatic coast, more and more tourists decide to spend more time in Zagreb, not only in summer but also in winter because of the ski resort which is only 15 minutes away from the city centre.

Portugal

The Region of the Azores Islands

In the Azores, in the last 20 years, the tourism sector has evolved immensely, mainly in terms of lodging offer. Currently, in mainstream hotel business, there are, in the archipelago, 71 establishments, with a total capacity of 8.023 beds.

Terceira Island, where the city Praia da Vitória is situated, offers 17 lodging establishments, with a full capacity of 1.647 beds. The Azores, in general, and Terceira Island in particular are highly affected by seasonality. In the island, the most recent figures identify a 12% occupancy rate of bed places in the winter and 45% in summer.

The Region of Viana do Castello

Tourism is unquestionably one of the most important economic activities in Portugal in general and in particular in our region, Minho (with an undeniable weight in the structure of exports): a sector with the greatest potential of development and further growth, with direct impacts on the "service economy" and indirect in attracting investment, domestic and foreign, for the region.

The Minho is undeniable and recognized conditions of excellence for the development of tourism, both in terms of his considerable physical resources (heritage, culture , history, religious, environmental and landscape), enabling tourists of any age and / or socio- economic condition an almost unique experience of multiple different experiences in a short time and territory.

The Minho is a unique region in this Europe of the regions: a small square, which concentrates an immense diversity landscape, heritage, cultural, historical, culinary, which translates into unique experiences, distinct and different, for those who visit or revisit . That is true for the national tourist as for the foreign tourist. Now is this diversity and unique experiences that tourists much demand but that, unfortunately, do not know that are still available in Minho, because this region is almost completely unknown in Europe and undervalued in Portugal.

It unanimously by all agents – public and private - directly and / or indirectly related to the tourism sector, that, given the current climate of contingencies, Minho is now facing a dangerous " wasting crossroads "; these contingencies due to several factors but with special focus on what the business agents describe as a bad map of "tourist regionalization " and the absence of a good and consensual strategy for the sector , medium and long term, likely to create hope and enhance the proper use of numerous resources , assets and capabilities. Your continued and reiterated waste , largely due to lack of allocation of means and resources , unfortunately translates into countless losses for the regional economy , resulting in a harmful loss of opportunity, loss of competitiveness , zero positioning in the " radar " markets, tourists and prescribers lead to an erosion of the sector.

Romania

In Brasov the tourism has developed constantly in the last 10 years; there were setting up a lot of private pensions and small hotels and also restaurants and bars. The total boarding capacity was at 31st of July 2014 of 787 units (according to National Institute of Statistics), Brasov county being on the first place at national level.

The number of tourists has also constantly grown, especially in case of foreign tourists, but there is a seasonality of the touristic flow: in Poiana Brasov (a ski resort located at 15 km from Brasov) there are more tourists during winter and in Brasov the number of tourists is growing during summer.

Brasov is taking advantage from its position near to Bucharest (the capital of Romania) and to Bran (where is located Dracula's Castle); as a result, a lot of tourists groups that are visiting Bucharest and Bran Castle also come to visit Brasov.

Unfortunately there are not so many recreation premises, especially in Poiana Brasov (that has not enough attractive offers for the tourist for the summer season).

Turkey

The mass tourism in Ankara is not so common but health and convention tourism are progressing. Ankara has many opportunities because of the capital of Turkey. Nowadays there have been progressed about accessibility.

There are too many food and beverage companies, and continuously the rising of this kind of companies hurts the market. The government should take under control rivalry

market. The owners of the touristic companies, especially hotels, were not graduated from tourism schools. These kinds of managers/owners do not have any experience about tourism sector. Most of the bosses coming from construction sector and this situation give reason to decrease pleasure of customer.

 The bosses of hotels do not have any experience about tourism sector.   Firstly they prefer investment in tourism sector then they are trying to learn tourism sector specialties. The tourism sector has unique preferences, so they cannot manage the sector, and this causes problems.

Among the regional development and investment, there are unfair. Thus the eastern side of Turkey cannot attract tourist. This cause to exceed carrying capacity of south and west sides of Turkey.

 There are problems about substructure and superstructure in tourist destinations. These cause problems to reach destinations or create new tourist destinations. The tourism in Turkey depends on seasonal tourism thus Turkey cannot show its potential the world. However Turkey has many potential because tourist can travel to Turkey in four seasons. Turkey has many opportunities especially in winter tourism.

3.1.3   Main STRENGTHS, WEAKNESSES, OPPORTUNITIES and THREATS in Tourism

Croatia

STRENGTHS:

- Transportation hub for the rest of the Croatia
- Good infrastructure
- Increasing quality in the hospitality industry
- Growing number of tourists
- Offer for winter and summer tourism
- Improving night life
- Improved tourism regulations by law

WEAKNESSES:

- High level of taxes

- Weak marketing and promotion

- Lack of entertainment

- Weakly defined Tourist offer

OPPORTUNITIES:

- The creation of Zagreb as a tourist destination

- Cooperation with other tourism regions - historical connection

- Orientation of a particular type of tourists

- Improve the tourist offer with additional content

- Increasing number of hostels and hotels

- Renewed camp facilities

THREATS:

- Poor cooperation between the subjects of tourism offer

- Limited sources of financing for development

- Increase of price for accommodation and beverages

Portugal

The Region of the Azores Islands

STRENGTHS:

- Geographical position of the island, within the archipelago, in the central group, close to 4 other islands;

- Important offer in cultural tourism, highlighting the historical and monumental heritage;

- Reduced tourism intensity;

- Lodging offer.

WEAKNESSES:

- Dependency on tourism operators;

- Weak commercial and marketing vitalisation;

- Positioning tourism with diminished action, animation or emotion.

OPPORTUNITIES:

- Increase the commercial vitalisation of the offer;
- Direct the offer to specific niche markets;
- Create specialised agents and operators;
- Opening of air space.

THREATS:

- Small volume tourist offer;
- Major internal competition, S. Miguel, the largest island, concentrates around 70% of the region Tourist Demand;
- Access to some islands still very expensive;
- Weak Tourist Demand.

The Region of Viana do Castello

STRENGTHS:

- Rich and diverse tourist offer
- Dynamic private tourism investment, focusing on Minho- Lima
- Vast and rich historical heritage , cultural and archaeological
- Popular Culture manifested in good hospitality , crafts and events traditional character

WEAKNESSES:

- The glaring lack of a tourism promotion strategy of Minho, concerted between private and public agents, has only contributed to the depletion of external demand, which can never be offset by Domestic Demand / Domestic, from Portugal and Spain.
- Human Resources are scarce, poorly qualified, worse prepared, without horizons and without career vision
- The corporate capital is generally weak, badly prepared and mostly made up of people without qualifications and tourism training.
- Low annual fees search / occupation

OPPORTUNITIES:

- Betting on Human Resources: Important role of the Hotel and Tourism School of Viana do Castelo and the Polytechnic Institute of Viana do Castelo (IPVC) - very positive work
- Affirmation of Minho brand
- Viana do Castelo Cruise Terminal
- European financing programmes for investments

THREATS:

- Stagnant tourism
- Loss of investment opportunities for other regions (resulting from a "Slow" and complex process of licensing / approval of projects)
- Financial and economic crisis

Romania

STRENGTHS:

- Available area, with a transportation infrastructure enough developed, located in the centre of the country, not far away from Bucharest in order to take advantage of the touristic flow from the capital.
- Cultural similarities with German community
- Existence of a tourism infrastructure: pensions, hotels and restaurants

WEAKNESSES:

- Existing sights are not enough valorised (renovation/restoration and improvement of architectural environment of the buildings)
- The area is not enough promoted abroad
- Low managerial capacity related to the valorization of existing sights
- High level of taxes, frequently changes of fiscal legislation

OPPORTUNITIES:

- European financing programmes for investments in tourism and buildings rehabilitation
- Non-reimbursable training programmes for the employees

- Development of on-line environment

THREATS:
- Development of touristic centres that polarizes the attention of local and foreign tourists (Austria - for ski, Sibiu – for business tourism etc.)
- Potential conflict in Ucraina

Turkey

STRENGTHS:
- Unexplored destinations
- Geographic location
- Hospitality
- Natural
- Young population
- 4 seasons holiday opportunity
- Modern facilities in some regions

WEAKNESSES:
- Lack of qualified staff
- Low budgeted tourists visit to Turkey   cause of   all-inclusive system thus Turkey cannot get enough income compared to Spain and France
- There is a contradiction between tourist arrivals and income
- Substructure and superstructure problems
- Problems in tourism education.

OPPORTUNITIES:
- Turkey is candidate of EU
- thus increase Turkey image,
- Turkey has many civilization reliefs, so it has many historical places.
- And for Christianity, Turkey has many sacred places, there are many churches for pilgrimage
- Turkey is a suitable destination for third age tourism.

- Taking consideration of EU population, it can be understood that it is getting older.

THREATS:
- as geographical position, Turkey is close to Middle East so the problem of Middle East reflect in Turkey as well
- there is raising rate of terrorist assaults in world , especially in Middle East
- Deteriorating of natural, cultural and historical attractions due to unplanned investments

3.1.4   Situation of low qualified Employees

Who are they? Can typical characteristics be identified (younger, older, men, women, ethnic group etc.).

Croatia

The fact that 11 percent of the total employed in tourism making unskilled workers is one of the major problems of Croatian tourism. The problem is the result of seasonal employment, when there is a greater need for workforce and therefore periodically employ all those who currently do not have a job, regardless of the level of their education. As a result, there is a large number of unskilled workforce during the season providing tourism services. Low qualified employees couldn't be framed in a specified age, gender or ethnicity category. This group is made from students who need a temporary job, older people who cannot find work through to uneducated individuals who agree to work at a very unfavourable terms.

Portugal

The Region of the Azores Islands

Low qualifications are transversal to age and gender. Tourism employees in the Azores are essentially inhabitants of the islands, there isn't a significant number of immigrant workers.

The Region of Viana do Castello

Low-skilled workers will be dragging and just survive in their jobs, because in fact there is low competition.

The older are the worst - full of "vices " and little or nothing available to learn , unlearn and learn again. Low motivation.

Romania

Low qualified employees couldn't be framed in a specified age, gender or ethnicity category.

Generally, active population of Romania is formed of the population with Romanian citizens, from all ethnical groups (a lower participation is registered in case of Roma minority, in all sectors, including tourism).

Turkey

Most of the tourism employees are comprised of 17-35 ages and as for gender about 25% of employees are women. The rest of the employees are men. Most of the low qualified employees are graduated from high school

What is their situation?

Croatia

Issues/deficiencies related to the training of unqualified/low qualified employees:

- Interaction with the customers
- Professional expertise
- Effectively solve critical situations with guests
- Knowing the structure of employees, and the hierarchy of responsibilities within the organization in which they work
- Foreign languages
- IT skills
- Soft skills

Deficiencies related to the training of medium qualified employees:

- Knowledge of the basic characteristics of the special regime of diet (diabetics, macrobiotics, vegetarians)
- Knowledge of foreign language in gastronomy and to know to use it to communicate with guests

- Understand the requirements of guests with the application of fast and quality activities
- Computer operating

Issues/ deficiencies related to the training of the management/ supervision personnel
- Business skills
- Professionally to treat all colleagues and employees
- Knowledge of classical and modern cooking techniques and the application of different ways of processing food.
- pro-active attitude
- Managerial skills

Portugal

The Region of the Azores Islands

They are, in the most cases, workers who use the sector to enter the job market. Normally they acquire, through informal training, the basic technical skills to develop the job.

The main gaps are:
- Teamwork and managing workplace relationships;
- Flexibility and adaptability to professional situations and technologic evolution;
- Lifelong training (availability, motivation and learning context);
- Interaction with clients in a differentiated manner considering their demands and the growing multiculturalism (attitude, friendliness, communication, including foreign languages, presentation, proactive behaviour, adapting to client diversity, problem solving and complaints...);
- Integration of commercial/promotion/sales components in interaction with clients, controlling costs and optimizing resources.

It should be stressed that the aspects mentioned above are very common in hotel and restaurant businesses. In the travel agency subsector, considering very specific technical needs, there aren't unqualified employees. In this area, training is ensured by vocational schools, hotel and tourism schools and, in many cases, by the companies themselves.

The Region of Viana do Castello

Low skills and little motivation

Romania

Issues/deficiencies related to the training of unqualified/low qualified employees:

- Rules related to hygiene
- Communication
- Interaction with the customers
- Knowledge of courtesy rules and general label/ label of the premises

Deficiencies related to the training of medium qualified employees:

- Availability to answer to clients demands
- Understanding the role of the employee in tourism
- Foreign languages
- Computer operating

Issues/ deficiencies related to the training of the management/ supervision personnel

- Understanding of subordinates needs
- Interrelation with the employees
- Addressing staff
- Organization of the workplace in order to ensure equity for employees

Turkey

They have problem with communicate with foreign people because they did not get proper foreign language education. Most of the low qualified employees come from the east side of Turkey. East side of Turkey has problems about employment, so they are moving to the touristic destinations of Turkey for seasonal jobs. Most of them are employed in service industry (that was the common view accepted by all participants)

3.1.5   Needs of low qualified Employees: What do they want? (Ambition to progress, working conditions, mobility etc.)

Croatia

Personnel with executive jobs, not necessary persons with no qualification, is motivated by the following elements:

- Taking control of their own destiny
- Recognition in society
- Doing work they like
- The possibility of exploiting their potentials
- The ability to change things
- The need to realize ideas
- Financial awards

Portugal

The Region of the Azores Islands

As mentioned previously, in most cases, these workers use the sector to get into the job market. However, it is more frequent for employees to choose the sector as a result of training in vocational schools. This is particularly evident in younger population. These are aware choices, with the purpose of enrolling a professional path in the tourism area, taking advantage, eventually, of the mobility opportunities within the country or the European Community

The Region of Viana do Castello

Very little enthusiasm; low motivation; very low wages and long hours of work.

Romania

Personnel with executive jobs, not necessary persons with no qualification, is motivated by the following elements:

- stimulating environment (elegant location, wipe, colleagues who respect the rules, chiefs who motivate people and are doing very well their job)
- integration in the collective
- the importance gave to value of their work

- manager thoughtfulness for ensuring equity between the employees
- attitude of respect, transmitted top - down
- attitude of involvement from the manager
- availability of the manager to be involved in executive work, side by side with the employees
- manager ability to work with the employees

Turkey

Firstly they want to get enough money to live. They expect to be improved working conditions. Especially in tourism sector hour of work is flexible. They complain the low salary in sector (all the participants approved)

3.1.6   What are their typical formal and informal qualification / competences?

i.e.: educational attainment? Have they finished other training, have they acquired competences by e.g. work experience? In which fields?

Croatia

They are mainly people with 11 years of education (8 years of compulsory education and 3 years of vocational school). Because of the economic situation in Croatia and high unemployment It often appears that highly educated (from other fields) work in the hospitality industry as assistance staff.

High seasonal demand for workforce causes often employment of workers whose education is not in the field of tourism. Many seasonal workers often work for the same employer each season and this is their only experience with the hospitality industry. The Croatian Ministry of tourism has launched a program that enables a free re-training, which lasts six months and provides participants training and certified diploma in various courses like waiter, cook, barmen etc. Often the tourist workers completed secondary vocational school from another field and requalified with this program.

Portugal

The Region of the Azores Islands

In Portugal, the compulsory schooling is currently 12 years. To complete the compulsory education teenagers can opt to enroll a vocational training experience (vocational schools).

Although the vast majority of tourism employees have no training, it is getting more common to find employees certified by vocational schools, either through initial vocational training or through adult training sessions.

Often is possible to find, among tourism workers, employees with a higher education in other professional areas. This is a way for them to get an income, sometimes in a part-time job, until they get a position in their own training areas.

The Region of Viana do Castello

The overwhelming majority of workers successfully held by the work experience having entered underneath. A small but already considerable contingent comes from Professional Schools.

Romania

In Romania compulsory education is now of 10 years; 25 years ago compulsory education was of 8 years. So that, generally, the employees from jobs that do not need qualifications have minimum 8-10 years of education.

However, it could be possible that persons employed as unqualified workers to have a qualification (meaning that they are graduates from vocational school), but in other field than tourism.

Due to the fact that the graduates from vocational schools don't find a job in their field, a lot of persons that are employed as unqualified are included in the second category (meaning that they have more than 8-10 years of education).

The participants at vocational training for adults have in most of cases a vocational training in other field.

There are cases when persons that are employed as unqualified are attending the vocational training by own initiative and, with the support of the manager, are qualified and then are working on qualified positions.

Turkey

Most of the staff employed are expected to know the job well and have experiences the position he/she is employed. Especially people graduated from tourism school (faculty, 2 years program) don't want to work in low position job, they want to be employed in manager positions. They don't accept the salaries, they don't find enough the salary we give, therefore they prefer working in state officer positions.

3.1.7 Situation of Training: typical Patterns of formal/informal Training

Croatia

Formal Training

- graduate of vocational school/ high school/ tourism faculty
- graduate of a form of education and qualified through trainings organized by a vocational training centre for adults
- Graduate of a form of education and qualified through free programs enabled by the Ministry of Tourism and the Economic Chamber.

In formal education will be provided a lot of theoretical knowledge to the detriment of the practical practice and applicable knowledge.

Informal Training

- On-the-job learning
- Apprenticeship programs(duration defined by law)
- Online education and etc...

For those where the traditional education system has scheduled, such as those who are early   school leavers, demotivated and frustrated students, additional informal education is perhaps the   only chance to get back "in the game". Non-formal education is very important and for various discriminated groups which are very hard

to find any employment. The availability of various forms of non-formal learning in Croatia is excellent but unfortunately poor utilized.

Portugal

The Region of the Azores Islands

With the exception of travel agencies, that require employees with very specific technical skills, the majority of companies practices very little formal training. The informal training is very dominant as a result of the low qualification of workers and the dimension of most companies (micro or small businesses).

Entrepreneurs identify soft skills as the most "absent" followed by basic technical skills that, however, are relatively easy to acquire through informal training in a workplace environment.

The Region of Viana do Castello

A few vocational training courses and Hotel School in Viana do Castelo. The sector is still much disorganized in Minho. Excessive individualism.

Romania

In the field of tourism, for an employee that works in this field, there could be encountered the following situations:

• graduate of vocational school/ high school/ tourism faculty

• graduate of a form of education and qualified through trainings organized by a vocational training centre for adults

• As regarding the attitude of the employees related to the training – there are the following situations:

   o they are willing to learn, with the condition that the training is presented as attractive by the manager and is carried on during the working programme

   o they are interested, part of them attending training by own initiative

   o the manager must take the initiative to organize the training

Training at workplace is carried in each tourism company, even not in an organized frame, through management care. Not all the competencies are likely to be transferred by the manager (e.g. foreign languages must be learned in a formal frame).

Turkey

Most of the restaurants have some training program such as self-training, education of first aid, safety, hygiene, job shadowing, Most of the hotels are employed intern students to educate, there are meeting, briefs for staffs for increasing the motivation and performance

There are ordinary meeting once a week, once a month.

3.1.8   Top Priorities in TouriSME

In the perspective of the national experts some of the top priority to improve the situation (in terms of strategies that can be pursued by regional actors like employers' associations, training centers, TourismSMEs etc.) would be:

Croatia

In order to improve the situation of training for the personnel in tourism, the participants have to:
- avoid cultural barriers in taking advantage of education effectiveness
- provide new skills and attitudes appropriate to the poor rural population
- provide education to those for whom education is not a realistic alternative
- Ensure all employees to achieve and maintain the necessary skills to perform their roles in the business process.

Portugal

The Region of the Azores Islands
- To improve the tourism situation in Terceira island, and in the region, the participants mentioned that:
- it is necessary to create/develop a "tourism culture" in the island/region population;
- to promote this "tourism culture" it should be adopted, from early ages, in elementary school, the training in Regional Tourism Information;

- it is crucial to adapt the training to the needs and dimension of the regional tourism companies, through specific programs instead of model training sessions;
- training should be performed in a workplace environment;
- the soft skills are the ones that require more improvement;
- lifelong training should be promoted as a personal and professional development tool.

The Region of Viana do Castello

Association around the AHET MINHO - Association of Hotels and Tourist Projects of Minho and around the ATURMINHO - Minho Association of Tourism.

These entities are compromised (committed) to give all in favour of appreciation, Training and Promotion of Minho Tourism.

Romania

In order to improve the situation of training for the personnel in tourism, the participants have indicated the following:

- it was suggested that learning methods should be provided for tourism managers and, if it is possible, supporting materials (e-book, printed materials)
- as regarding personnel training, the manager must set the tone: he must motivate employees, train them, because he is the interface between employees and customers and has the necessary authority related the result of training (effective learning)
- if the training is not provide by the manager, than he must ensure that all employees are trained
- if the manager is trained, he could resume/ replay the training for new employees (depending of personnel fluctuation).

There are no specialized sites for the promotion of training programs, no official information sources (institutions, organizations) that ensure tourism managers the information regarding the existing vocational training programmes. This issue should be solved through the centralization of the available information and providing it on – line for the managers.

Turkey

Ankara is an important place for tourism education. Ankara is the one of the place where the tourism education started. Tourism institutes and schools should use these advantages of Ankara much more. The curriculum of tourism education should be adapted the needing of sector much more.

A participant mentioned that tourism schools are unnecessary because those schools don't educate the students according to how sector expect. The students graduated from tourism schools don't want to work in tourism sector because of working condition and the people graduated from tourism school don't have practical skills so we don't want to employ them we prefer the employee having practical skills, therefore practical skills of students should be improved firstly by school. Schools are abstained from real sector

The tourism institute and education centre should be in communication with all the sectors. This kind of activities can be implemented by of chamber of tourism or associations. Professional tourism institutes create a department for this kind of education programs. They create their education centres for staff's education.

3.1.9 Other Topics identified in Focus Groups

Other topics came up during the discussion.

Croatia

- Administrative obstacles
- Short open hour (by the low)
- High workforce fluctuation
- Owners are not motivated to invest in education of employees
- Higher costs for formal and informal education
- Fervently changes of regulations

Portugal

The Region of the Azores Islands

- Some participants highlighted the lack of professional culture at many different jobs associated with tourism.

- It was also highlighted the weak performance of people actively looking for a job – they do not know how to do a job interview and poorly write their CV.
- Also mentioned was the low motivation of the general population to work in the tourism sector, as it is widely considered socially irrelevant.

The Region of Viana do Castello

The Tourism promotion as the weakest point. It is urgent promote, value and shell the brand MINHO TOURISM.

Romania

It was discussed about the way of designing training programmes at workplace in order to achieve their scope in an efficient way (the ideas presented are coming from the trainers/ consultants):

- Trainers suggest that a training programme at workplace should start with a preliminary analysis in order to identify learning objectives established by the manager and then developing the curricula and supporting learning materials
- The analysis could be done by external experts
- Managers should establish quantified requirements for learning in case of the employees, make an assessment of competencies and then a training plan
- Employees assessment could be done with tests, questionnaires, individual or group interviews realised by chiefs and completed with employees observations

The role of external consultant:

- to provide to the manager a set of instruments for employees needs analysis
- to discuss with the manager and support him in setting up the standards for training
- to assist the manager to submit what he is expecting from the employees and to help him to accomplish his expectations
- consultants must be specialised in tourism and know occupational standards for tourism
- consultant must support and motivate the manager; also must help him to clarify the objectives and expectations
- consultant must understand the manager
- consultant could suggest learning methods

- consultant could identify needs that manager is not aware off
- consultant could assist at learning process (this idea is then contradicted by the group in the following discussions)

What the consultant shouldn't do (those ideas were categorically affirmed):
- could not provide the training for employees
- could not assist/ attend the training, because the managers could have the impression that they are monitorised, investigated and put into a bad light vis a vis the employees; if the manager ask the consultant to attend the training, this could be done, but it will be better to avoid this situation, in order to avoid other complications (but it could be possible to record the training and to discuss about improvements).

Methods proposed for learning:
- mixed teams of 2-3 persons, possible with different specializations if they are not employed with the same profession;
- brochures, examples related to employees experience;
- role play, case studies;
- stories, scenarios, internal contests.

Methods for quantifying the benefits of training programmes at workplace:
- customers satisfaction, satisfaction questionnaires
- comment cards filled in by the clients, highlighting the best employees
- initial and feed-back questionnaires applied to managers and discussions related to it

Turkey

As hospitality sector, it is basic to run a hotel if you have enough money, you can buy a ready building then restore it, put bed and bath in room, the hotel is ready. But this is not ethic way to run a hospitality institute. Firstly you should make the feasibility working, control the location, work on substructure and superstructure, and then you should decide to build an accommodation resort. That is why the pleasure of customer may decrease and the image of tourism in Turkey may be affected badly. So law

regulations should be taken as soon as possible by government. Every one wanting to own a hotel shouldn't have a hotel, there should be much more certain rules

As for restaurants, every day a new restaurant is opened, and in the same street, there are many restaurants seeming each other. This situation hurt the restaurant owners. Because of attracting the customers, the restaurants are in dilemma. There must be some criterions such as limiting the rate of restaurants in the same street. This situation gives reason to not find qualified staffs as well. Because there are too many restaurants that the restaurant's owner doesn't have chance to select qualified staffs. There aren't enough qualified staffs to meet the needs of sector. Therefore importance of qualified staffs is disregarded.

The atmosphere during the focus groups was described by the coordinators as excellent, participants being very interested and active. All participants will support the project in the form of further promotion, cooperation; suggestions and exchange of experiences.Most of the invitations addressed were accepted.
The elements of the Focus Group were actively involved in the discussion, presenting their corporate and personal experiences and sharing their perspectives of both development and improvement of the sector in the region and particularly in the island.
All the elements in the group consider highly important the discussion topic and there was a great consensus opinion. The companies and the organization will be themselves, diffusers of the project.

3.1.10   Other Information

In Romania the consultants/trainers have indicated as being very important for the unqualified employees the following competencies:

- Communication in native language

- Social and civic competencies

- Learning competencies

- Entrepreneurial spirit

Pension's owners have indicated as being very important for the unqualified employees the following competencies:

- Communication in native language

- Communication in foreign languages

- Social and civic competencies

- Learning competencies

It could be noticed that viewpoints are similar/ concures.

3.2 Desk Research –Synopsis of Results

On the pages to follow the information retrieved by the partners according to a common research template are presented in synchronoptical format.

General situation and Relevance of Tourism[3]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		
• Traditionally, Croatia is a tourism oriented country. • Historical heritage, natural beauty and pleasant climate make up the framework which, together with the development of high quality accommodation, the rich supply of activities and entertainment, and particularly good service, shall enable Croatia to attract the modern-day tourist • The most important tourism potential in Croatia is the Adriatic Sea. The unique characteristics of the seawater (crystal clear and clean) and coastline (length and indentation – approximately 1800 km. long, relatively sparsely inhabited coastline with over 1000 islands of which only 66 are inhabited) together with a mild climate, have long been recognized and used as the main comparative advantages of Croatian tourism.	The *Tourism* sector in Portugal includes companies operating in "Transports and logistics", "Accommodation and food services" and "Recreational and cultural activities". In 2013 Tourism represented: • 13% of the total Nonfinancial Corporations in Portugal; • 10% of the Gross Domestic Product; • 8% of employment. Still in 2013 it grew 3%, other Nonfinancial Corporations grew 2%. In the last decade, the weight of the sector in analysis increased in all indicators considered, with emphasis being placed on the number of people employed.		• Romania's economy is mainly based on industry, construction, public administration and commerce; **tourism is not a leading activity.** • GDP from tourism was of 33.100 million RON in 2013. • **Tourism contribution to Romania's GDP was 5,1% in 2013** • Statistics show that tourism serves mainly Romanian tourists, which represent the majority of customers: in 2013, total number of Romanian tourists was of 6.203.997 persons, comparative with 1.714.538 foreign tourists. • That same year, the average number of Romanian tourists accommodated in the main housing units was 517,000 persons and the average number of foreign tourists was 142,878 people. The most popular tourist accommodations are hotels (75%), followed by agro-tourist	• **Turkey is currently the 6th most popular tourist destination in the world, attracting more than 30 million tourists each year, and the number continues to rise every year**. • Adding to Turkey's natural riches, the country is the birthplace of many ancient civilizations that left their mark in history. • The Anatolian Peninsula has a vast number of archaeological sites inherited from various empires and diverse cultures, some dating back millennia. • **From 2007 to 2012, the number of international tourist arrivals increased 37 percent, reaching more than 31.5 million foreign visitors.** • In 2012, the number of airline passengers in Turkey exceeded 130 million. Istanbul is the 8th most popular convention destination with 128

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[3] What is the general situation and relevance of tourism in your country?

- At the moment tourism is the only healthy economic activity in Croatia and has a direct contribution of **10.4% to the GDP (Tourism Satellite Account Methodological Framework, UNWTO). Total impact of 14.3% to the gross value added (Input output model) and employs d**irectly 9% of Croatian workforce.
- According to official statistics from 2010, the **accommodation structure** is as follows: private accommodation facilities (45%), camping sites (28%), apartments and tourist resorts (7%), hotels (14%), other facilities (6%). The biggest increase in accommodation facilities is in hotel industry that grew by 6% from 2007 to 2010. In the first half of 2010, the biggest number in overnights was in hotels (44%), camps (22%), and private accommodation (16%). While hotels do not account for large percentage of capacity (only 14%), almost half (44%) of tourists stay in hotels. Hotels have poor occupancy rate of 45% on average, making such industry uninteresting for investors. In 2011, Tourism's direct contribution to GDP was 11.6%. Including its wider economic impacts, it accounted for 27.6% of GDP, 44.1% of total exports, 10.8% of total investments and 12.7%

- Tourism is a strategic sector for the national economy: 46 % percent of exports of services, and more than 14 %of total exports and 10 % of GDP.
- It is strategic in several ways: for employment (8 %), for retraining, as well as for the protection of the environment and promotion of cultural heritage, and is thus a strong enhancer of economic growth and social development. The impact of tourism in terms of national economy is therefore unavoidable and cross all sectors, creating employment and wealth.
- The regional tourism organization on the continent is carried out through five Regional Tourism Organisations (ERT) - North, Centre, Lisbon, Alentejo and Algarve.

boarding houses and tourist boarding houses in cities.
- Most of tourists arrivals are recorded in Bucharest and towns county residences (50%), indicating a preponderance of business tourism and cultural tourism, followed by arrivals in mountain resorts (16%) preferred for sports winter.
- Regarding the utilization rate of the tourism, stands spa resorts (36%) are
- on the first place, preferred for treating various health problems, especially for older people who receive state subsidized price tickets.
- On the second place is Bucharest and towns county residence (25,5%), favourite for business and cultural tourism, followed by the tourism in the Danube Delta (25.2%), where there are few hotels / tourist boarding houses and units from the Black Sea, where there are seasonal tourism from May to September, with peak arrivals in July and August

congresses and conventions held in 2012. (International Congress and Convention Association - ICCA) Turkey has 7,200 km of coastline and offers beautiful beaches; has 355 blue flag-beaches and ranks 4th among 38 countries. There are also 19 blue flag-marinas in Turkey. Turkey is an emerging destination for golf tourism, with 15 operation licensed golf tourism facilities.
- The **Turkish tourism industry has grown above the global average in recent years and the direct contribution of the industry to the GDP reached USD 30 billion in 2012**. The tourism sector targets **60 million tourist arrivals and revenues of USD 80 billion by 2023.** Istanbul Atatürk Airport had more than 45 million visitors in 2012, of which 29 million were passengers on international flights. 25 million passengers flew to Antalya Airport in 2012; 20 million of these passengers were passengers on international flights. Antalya Airport has more than 50 different airways flying from/to more than 75 destinations.
- Antalya Airport is ranked the 21st busiest airport in the world by number of international passengers. Turkey is among the top seven countries in the

of total employment in 2011 (World Travel & Tourism Council, 2012).The biggest occupancy rates are seen during summer in the prime season, while the offseason produces poor results. There are number of reason why hotels underperform, one of which being out of touch with modern guests. Of the ways how to be in touch with the growing demands is the hotel design. Daily cost of hotel visitors is 100 euros per person.			world and ranks 2nd in Europe with its 1,300 thermal springs. Bed availability in thermal vacation resorts has reached 35,000. The average overnight stays for foreigners was 9 nights, while for citizens that reside abroad the average was **22 nights**, nearly triple the number. This fact underlines the power of inbound tourism Turkey has invested in many projects that develop national and international highway networks. Turkey's total revenue from international visitors was more than USD 28 billion in 2011. • **Business Monitor International forecasts revenues to exceed USD 35 billion by 2017**. The contribution of the travel and tourism industry to Turkey's GDP has a higher growth forecast compared to that of Europe. **From 2013 to 2023, average growth is expected to remain around 3% for Turkey.**

Relevance and Proportion of SME in the Tourism Sector[4]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		
	• 91,8% micro-enterprises; • 8,1% small and medium-sized enterprises; • 0,1% large enterprises • In 2013 the tourism sector comprised about 49,000 companies in Portugal, representing 13 % of the aggregate of Non-Financial Companies, 5% of its turnover, and 8 % of the number of employees. • In 2013, the „hotels and restaurants" stand out in the tourism sector with regard to the number of persons employed (75%) and at number of companies (71%). By turnover, the „Transport and Logistics „represent 45 % of the total, compared with 39% of „hotels and restaurants" and 16 % of "recreational and cultural agricultural activities. " • The overwhelming majority of the number of tourism companies in the sector is in the class of micro-enterprises (91.8%), SMEs (8.1%) and large companies (0.1%). As for the number of persons employed, 84 %		• GDP from tourism was of 33.100 million RON in 2013 • Tourism contribution to Romania's GDP was 5,1% in 2013 • SMEs contribution to tourism turnover was 84,6% • 96% of the accommodation and food in Romania are private • 77.5% of the accommodation units are 2 and 3 stars • Romania is in last place in Europe in terms of tourism contribution to GDP, surpassed among others Albania (16, 7% din PIB), Bulgaria (13, 3%), Hungary (10, 6%), Czech Republic (8, 4%) and Slovakia (6%) • The number of jobs in tourism put Romania on the last position among neighbouring countries and ranks 136 in the world.Employees serving the tourism and restaurants account for	

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4 What is the relevance and proportion of SME in the Tourism Sector?

	were concentrated in small and medium enterprises (SMEs) and micro-enterprises.	approximately 3% of all employees in Romania, approx. 130 700 people. • In the hospitality industry, employees are predominantly women (60%). • This sector is not preferred by the working population for the following reasons: • Net earnings is lower than in other sectors: in tourism, the average monthly net earnings is 878 RON (195 EUR) compared to 1,622 RON (360 EUR) in all sectors • Work is exhausting: requires effort and extended work program variable, depending on customer needs, work during night • Low social prestige associated with tourism professions, especially for jobs that require a medium level of qualification • Lack of promotion opportunities as small units predominate	

Relevance and Proportion of SME in the Tourism Sector[5]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		
	91,8% micro-enterprises; 8,1% small and medium-sized enterprises; 0,1% large enterprises - In 2013 the tourism sector comprised about 49,000 companies in Portugal, representing 13 % of the aggregate of Non-Financial Companies, 5% of its turnover, and 8 % of the number of employees. - In 2013, the „hotels and restaurants" stand out in the tourism sector with regard to the number of persons employed (75%) and at number of companies (71%). By turnover, the „Transport and Logistics „represent 45 % of the total, compared with 39% of „hotels and restaurants" and 16 % of "recreational and cultural agricultural activities. " - The overwhelming majority of the number of tourism companies in the sector is in the class of micro-enterprises (91.8%), SMEs (8.1%) and large companies (0.1%). As for the number of persons employed, 84 %		- GDP from tourism was of 33.100 million RON in 2013 - Tourism contribution to Romania's GDP was 5,1% in 2013 - SMEs contribution to tourism turnover was 84,6% 96% of the accommodation and food in Romania are private 77.5% of the accommodation units are 2 and 3 stars - Romania is in last place in Europe in terms of tourism contribution to GDP, surpassed among others Albania (16, 7% din PIB), Bulgaria (13, 3%), Hungary (10, 6%), Czech Republic (8, 4%) and Slovakia (6%) - The number of jobs in tourism put Romania on the last position among neighbouring countries and ranks 136 in the world. Employees serving the tourism and restaurants account for	

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• In the hospitality industry, employees are predominantly women (60%).
• This sector is not preferred by the working population for the following reasons:
• Net earnings is lower than in other sectors: in tourism, the average monthly net earnings is 878 RON (195 EUR) compared to 1,622 RON (360 EUR) in all sectors
• Work is exhausting: requires effort and extended work program variable, depending on customer needs, work during night
• Low social prestige associated with tourism professions, especially for jobs that require a medium level of qualification
• Lack of promotion opportunities as small units predominate | |

Training System for Tourism[6]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		
Vocational training (secondary school level) • 5.5 thousand pupils enrolled each year • 17 vocational schools specialized for tourism and hospitality education • 74 schools offering some of tourism and hospitality program. • 4-year program-certificate for hotels and tourism operations or agro-tourism • 3-year program-chef, waiter, pastry maker. **Tertiary level** • 2 thousand students enrolled each year • Tourism programs offered at 15 universities and colleges of higher education • Program-bachelor for tourism management • Program-bachelor for tourism management • Postgraduate business and research masters and PhD programs	• In Portugal certified training is performed in hotel and tourism schools belonging to Turismo de Portugal, i.p. (Portuguese Tourism Board), subject to the authority and supervision of the Ministry of Economy and in vocational schools. • Currently the informal training prevails considering the size of the companies. • In Portugal, **Turismo de Portugal (Public institution)** provides **training** in hotel and restaurant industry. With **16 schoo**ls, spread in all the country, covering all the sector thematics, they have programmes for young people undergoing basic training and professionals in labour market. • **The School of Tourism of Portugal**, have curricula adapted to market requirements and was designed jointly by the best school in the world in the sector - Ecole Hoteliere de Lausanne. • The **rate in activity**, six months after the completion of the course is **80 %, and 64% of students found a placing on the market at the end of a month, with the**		Tourism training system is structured on three levels: **First Level** **Duration – 3 years Qualification Diploma** • Public vocational schools • Dual vocational schools, public-private partnership • Private vocational schools Second level Duration – 4 years Bachelor's degree diploma • Public high schools for tourism • Private high schools for tourism Third level Duration – 3 + 2 years Bachelor Programmes Master Programmed Post-graduate courses • Public universities • Private universities	• From total 154 universities, 99 of them give education in tourism field • There are 24 tourism faculties • 17 Vocational High Schools with Bachelor's degree give tourism education • 16 Administration faculties give tourism education in the department of tourism administration • There are generally 4 different programs called Tourism Administration Departments, Travel Agency and Tourism Guide, Recreation Management, Gastronomy and Culinary Arts with Bachelor's degree • There are 2 years program under different vocational schools such as Tourism and Traveling Services, Tourism and Hotel Administration, Tourism Guide Cultural Heritage and Tourism, Tourism Animation etc.

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6 Please give a brief overview of the general Training System for Tourism (School-based? Is it company based? Based on certified training? Does informal training in family businesses dominate in SME?)

• More recently-multidisciplinary courses offer students possibilities to combine tourism with other specialties.	**difference that 26% have been integrated into their own hotel units** or restoration where were the internship. • However in Portugal **informal teaching** continues to **dominate** in tourism SMEs.	Fourth level Short term programmes: • Initiation • Specialisation Long term programmes: Qualification – 1st level (360 hours) Qualification –2nd level (720 hours) Qualification – 3rd level (1.080 hours) • Private companies • Public institutions	

Skilled workers vs unskilled workers in tourism[7]

CROATIA	PORTUGAL	ROMANIA	TURKEY
Employment in Croatian Tourism Industry- age structure (in legal entities) • About 80% between 25 and 55 years of age • 13% of those older than 55 and • 7% younger than 25 **Workforce Education (in legal entities)** • 54% secondary school education • 18% are highly skilled/skilled workers • 12% semiskilled/unskilled and • 4% have just basic education • Only 12% of employees with university or college degree in the sector	**AZORES REGION VIANA REGION** We can determine that the Portuguese Active Population (around 5.225 million people), in 2014, presented the following schooling levels: • 2,3% none; • 50,4% elementary education; • 24,4% secondary and post-secondary; • 22, 9 % higher education. On the other hand, in what concerns Vocational Training (Initial Vocational Training* and Continuing Vocational Training**), in terms of Accommodation and Food Services companies with 10 or more employees, we can add that: • 52,3% did some training (IVT/CVT); • 12,5% did/had employees with IVT; • 49,5% did CVT The annual average training time was 42, 1 hours/participant. * IVT should be part of a formal programme that provides a level of qualification equivalent to	Companies from tourism sector are perceiving a **crisis** of qualified personnel: • Less than 20% from graduates of specialized training institutions are working in tourism sector • A great number of trained personnel is leaving the country for working outside • Personnel training is not continued at workplace by managers • Continued training at workplace is not made Estimated **necessary** yearly training of the personnel • Management: 800 -1.000 persons • Supervisors: 1.000 -1.400 persons • Specialists: 3.000 – 4.000 persons (for kitchen) • Qualified workers: 2.000-2.500 persons (restaurant services, reception, cleaning) •	• About 20% of the employee with university or college degree in the sector • About 15 of the employee with highly skilled/skilled workers • About 60% of the employee with secondary school education • About 5% of the employee with basic education

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[7] Please estimate or make reference to secondary data on the overall percentage of skilled workers vs unskilled workers in tourism (estimate if secondary data are not available). (Skilled meaning a degree from a tourism school (or University) or professional degree from a 2 year +

apprenticeship programme).

	lower secondary (9th grade) or secondary (12th grade). It should preferably be intended to young people under the age of 25. The conclusion of the training programmer is mandatory condition for qualification. The duration of the learning process varies between 2000 and 3700 hours. ** CVT can be performed through Training Courses (Internal and External) and in the following categories: • Previously planned work post training; • Planned training through rotation of working posts, interchanges or postings; • Planned training through participation in learning/quality circles; • Planned training through self-learning; Planned training through participation in conferences, workshops, exhibitions and lectures. • Despite the growing importance of worker skills as a fundamental resource to response the increasingly complex demands of consumers, this sector still dominated by low levels of education and qualification, although the trend is to increase those levels. The high percentage of managers with basic schooling , which exert their activity without specific training is important ; • This type of conditions and relatively low wages lead to high staff turnover. These subsectors have difficulty retaining	• Those are covering 55% of yearly additional necessary of personnel from hospitality sector. • Most of personnel doesn't need institutionalized training, they could be trained at workplace	

	employees, especially the younger ones, which are also the most qualified. Also contributing to this situation the low status and social image of the sectors, which have a reputation for not offer career opportunities and personal development. The issues of the informal economy , undeclared work , especially part-time and seasonal work , are also remarkable features of the labor market in these sectors;		

Characteristics of TouriSME Employees[8]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		

CROATIA	PORTUGAL	ROMANIA	TURKEY
estimated percentage of women among Skilled/unskilled workers: **Accommodation and food service (in legal entities)** • Employs about 48 thousand persons • Women overrepresented (56% are women) • 64% employed in accommodation and 36% in food and beverage sector **Accommodation and food service (enterprises registered as craft and trade)** • Employs 36 thousand persons (52% women) • High seasonality of demand creates large pool of seasonal • workforce - often less skilled, underpaid and poorly motivated • Geographical concentration of demand along the coast	Employment is mostly female (58 %), except in occupations related to the management **Education Level** **Women %** None 1% 1st Cycle 11% 2nd Cycle 9% 3rd Cycle 18% Secondary and postsecondary 27% Higher 34% Estimated percentage of migrant workers/minorities among skilled/unskilled workers: • According to the census 2011 in Portugal reside 394,496 foreigners accounting for 3.7 % of the country's residents. 61.10% are active. • The percentage of foreign population with an education level below the 3 cycle of basic education is 28.2%. The secondary and post-secondary education is the most	• In the hospitality industry, employees are predominantly women (60%). • There are no statistics available but we can say that there are no migrant workers in tourism since Romania is not yet a destination for immigrants in general. National minorities are not discriminated against, except the Roma population, so everyone can work in tourism. Ethnicity has no implications for the labour market, except that the Roma population is generally excluded from the vast majority of industries and from tourism too. • All occupations related to employees are classified in Occupations Code in Romania (COR). This document set out what level of education is necessary for each occupation separately. Analysing the COR, we see that in tourism are four jobs that can be occupied by persons who have completed only 8 to 10 classes (given that education is compulsory up to 10 years). Consequently the vast	**estimated percentage of women among Skilled/unskilled workers:** 25% of insured labours in tourism sector is women 24.000 of them work in accommodation sector 27.000 of them work in food and beverage sector 2.000 of them work in aviation sector 12.000 of them work in travel agencies (there is no certain results or official results) **estimated percentage of migrant workers/minorities among skilled/unskilled workers:** According to OECD report, the migrants worker who take working permission in Turkey raised to 45,850 by increasing 42% in 2013 opposed to 2012 The certain number of migrant work in tourism sector not know completely

8 a) estimated percentage of women among Skilled/unskilled workers

b) estimated percentage of migrant workers/minorities among skilled/unskilled workers

c) estimated percentage of persons without a school degree among skilled/unskilled workers

Erasmus+ | TouriSME Comp

• requires large migration of seasonal workers from north to south
• Unfavorable work conditions – attracts low skilled workers or
• those will little experience in T&H
• Significant share of unregistered workers.
b) estimated percentage of migrant workers/minorities among skilled/unskilled workers:
 	
• 2/3 of all workforce in Croatian tourism are migrant workers.
c) estimated percentage of persons without a school degree among skilled/unskilled workers:
 	
• 12% semiskilled/unskilled and
• 4% have just basic education
	represented in the foreign population with 32.7. 14.4% have higher education.
	    c) no data
	Unable to get accurate data. However, immigrants and migrants do not represent a significant number in the Active Population of the Azores.
		majority of tourism occupations require education, meaning more than 10 classes completed with a diploma qualification. In addition, companies and labour inspection (public institution) check documents for training and professional experience of employees. In conclusion, we can say that there are very few people working in tourism without a minimum level of training, a maximum rate of 5-10%.	Turkey take many refugees from Syria due to internal turmoil, according to some sources the number of refugees from Syria rise to 2 million and these refugees spread different part of Turkey. Most of them work in service sector and agriculture
			   a) **Estimated percentage of persons without a school degree among skilled/unskilled workers:**
			About 20% semiskilled/unskilled and especially some part of Turkey coastal part, tourism workers are employed as a seasonal and because of high demand and lack of skilled worker, they employ unskilled worker

Strengths/Weaknesses/Opportunities/Threats of the Tourism Industry[9]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		
Strengths: • Natural beauty of the Adriatic coast and islands, as well as tourism potential in the continental part (thermal springs, castles, protected areas, etc.) • Ecologically clean and natural surroundings. • The geographical position of Croatia allows for quick access to the main European markets • Personal safety, in terms of both accommodation and destination • A rich, cultural and historical heritage with a few globally recognized and protected locations • Characteristic tourist loyalty towards Croatia. **Weaknesses:** • The image of a lower quality summer tourist destination and the image of a country from the war-torn Balkans.	**Strengths:** **VIANA** • Wealth of endogenous resources as strategic factors of differentiation, with national and international dimension (e.g. wine) ; • Vast and rich historical heritage , cultural and archaeological; • Winery offer with high profile; • Routes and Circuits (Routes of wines , Romanesque Route , Santiago Way) ; • Popular Culture manifested in good hospitality , crafts and events traditional character; • **Good accessibility interregional North / South (VR);** • **Francisco Sá Carneiro Airport renovated and greater carrying capacity (6 million passengers / year) (VR);** **AZORES** • Secure Region. • Unique offer in natural resources; • Authenticity;		**Strengths** • High touristic potential, due to diversity of natural resources, history, culture and traditions • Climatic conditions offers the possibility to attract tourists in all seasons • Increasing number of accommodation structures **Weaknesses** • Insufficient promotion of touristic sector • Negative touristic balance • Negative perception of Romanian tourists related to the quality of touristic services • Insufficient development of infrastructure • Opportunities: • High potential for the development of new types of tourism (e.g. ecotourism, agro tourism, experiential tourism) • European funds for tourism infrastructure development	**Strengths:** • To be near to target tourism markets as a geographical location • To be getting popular destination of Turkey nowadays • To be made the investments of tourism in undiscovered and unspoiled natural places with appropriate climate, natural sources • To be Turkish tourism investments more modern and news than rival countries **Weaknesses side of Turkish Tourism** • The unplanned and irregular constructions exceeded the carrying capacity • The rise of secondary residences, the hardness of finding appropriate funds in order to implement the tourism investments • To be lack of infrastructure and superstructures according to requirement of sector • To be inappropriate of investments of tourism to profiles of tourist coming

9 What are the main strengths/weaknesses/opportunities for the tourism industry in your country (keypoints)?

• An incomplete process of hotel privatization	• Reduced tourism intensity;	**Threats**	to country or inappropriate to attraction of regions
• Lagging behind in terms of concepts and technology and a low average level of quality of accommodation facilities	• Offer with high potential in creating *clusters* (sports, wellness, diving, whale watching);	• Competition from other Eastern European countries	**Opportunities Sides of Turkish Tourism**
•	• **Ranked by *National Geographic Traveler* second best world destination in sustainable tourism.**	• Negative effects of international crisis	• Turkey has many high rivalled alternative tourism sources (Historical, Natural, Health)
• An extremely small presence of international brands	**Weaknesses:**		• Turkey is a suitable potential destination for third age tourism with high income because of the population of Europe getting older
• An unsatisfactory choice of quality events and variety of services; insufficient hospitality and charm	**VIANA:**		• The candidacy of Turkey to EU
• An overall poor transit infrastructure and inadequate connections on all levels (i.e. airlines, etc.)	• Inability to fixing visitors in the region (as reflected in the low rates occupancy and average stays);		**Threats of Turkish Tourism**
• Low level of occupancy rates of facilities, highly pronounced seasonality and low average rates with respect to international competitors.	• Deficit image and reputation in international markets;		• Due to all-inclusive system, tourism investments are marketed cheaply and therefore this situation effect on tourism investments negatively
• Liquidity problems and insolvency of a majority of tourist companies	• Dependence of domestic tourism;		• Rising of Terrorist assaults both in Turkey and world
• Lack of professional management.	• Weaknesses in the quality of services;		• Deteriorating of natural, cultural and historical attractions due to unplanned investments
	• Lack of qualified human resources in the sector		• As a geographical location, the tension in Middle East
Opportunities:	• Reduced accommodation offer (the top level) , with implications for the visitor typology and negotiating capacity and attractiveness of the region ;		
• Continuous growth in interest of emitive markets for Mediterranean destinations.	• Weaknesses in terms of tourist activities and promoting events;		
• Thanks to its natural potential and "access to the sea" position for other European countries, Croatia has all	• Incoming / Receiving activity still underdeveloped ;		
	• Coordination difficulties between the various agents operating in the tourist market;		
	AZORES:		
	• Reduced notoriety;		
	• Weak commercial and marketing vitalization;		
	• Unexplored and untargeted offer;		

tendencies to attract a significant part of the demand for nautical tourism	• Positioning tourism with diminished action, animation or emotion.
• Availability of quality coastal area: due to the 10 year stagnation period, excessive development has never come about, and therefore, beautiful and unspoiled nature has been largely preserved.	**Opportunities:** **VIANA**
	• According to the OMT is expected to sustained growth for industry tour the next 20 years;
• Thanks to its geographical location, along with an adequate transit infrastructure, Croatia can increase its share of individual guests, and coach tours.	• Emergence of new consumption patterns and motivations. Favoring destinations that offer different experiences with degree of authenticity and environmental quality (Culture, Heritage , Nature, Gastronomy , Sport ...) ;
• Ideal natural preconditions (a large number of thermal springs) for organizing quality offerings in wellness programs and events, and development of health and pleasure tourism	• Increased tourist business competitiveness in the region due to increased offer low-cost travel ;
	• Routes and tours clearly for specific market segments, may contribute to the creation of alternatives , combined tourism products and high standards of quality and diversity;
• A newly constructed motorway which goes through rich protected natural areas, suitable for designing diverse offerings en route to the coast - tourist micro regions.	• Political recognition and inter- institutional mobilization for development Tourist Region (PENT ; PIT , Calendar Regional Tourism Task Group Douro) ;
• Restoration and promotion of old roads of great memorial and scenic values which will enrich Croatia's tourist offerings.	• Greater coordination between public and private investments around strategies outlined (e.g. PDTVD.);
	• Private tourism investments underway and intentions of other new investments
• Development of sustainable hunting tourism in the continental part of Croatia, in areas which have a rich range of animal species.	• Next period of Structural Funds and Cohesion Programming
	• Francisco Sá Carneiro Airport in expansion

- A large number of medieval castles which are an unexploited potential.
- Possibility for the development of sport tourism with a special focus on golf.
- Tourism can stimulate a faster growth of production and trade, by way of tourist companies selling Croatian products, especially if they are competitive both in price and quality, and thus contributing to the place-specific tourism supply.
- Unpolluted soil suitable for cultivating organically grown food.

Threats:

- Conflicting development options. Non-stimulating macroeconomic framework.
- Environmental pollution (the Po River, potentially JANAF (Adriatic Pipeline)
- Natural potential is jeopardized due to forest fires, owing to insufficient care of waste waters and unlicensed garbage dumps, uncontrolled hunting tourism, dynamite fishing, and sub aqua poaching.
- Intensive development of international competition in the sense of new concepts, higher quality, and better performance of business operations.
- Due to unfavourable demographics and total economic development in

AZORES

- Increase the commercial vitalization of the offer;
- Direct the offer to specific niche markets;
- Create specialized agents and operators;
- Maximize nature tourism and ecotourism;
- Opening of air space.

Threats:

VIANA

- Difficulty of affirmation and development of Portugal , while market European , given the gradual demand for destinations outside Europe;
- Loss of competitiveness on destinations / competitive regions , with same offer typology , which may result in a decrease in market share Northern Region of Portugal ;
- Competitive weaknesses of the destination assignable to the difficulty of stating in Promotional terms Region (and your offer) in major international markets ;
- Persistence of the main jam problems in particular to level of infrastructure (accessibility) of landscape management and quality the environment;

AZORES

- Small volume tourist offer;
- Risk that the (9) islands do an individualized offer and compromise the brand "Azores".

Western Europe, demand could stagnate at a high level. • Inefficiency of spatial plan implementation and bending of zoning regulations • Unplanned usage and speculative purchases of building land may appreciate building land prices which in turn may dissuade potential investors. • Possible lack of close cooperation at all political, administrative, economic and social levels. • Extra-long privatization process may delay the start of the investment process.			

Qualification Challenges[10]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		
Modernization of educational system under way with	**Strengths:**		**Strengths:**	**Strengths:**
• **Structures set up to bridge gap between education and employers**	• Tourism Schools		• Training providers are authorized/ accredited by specialised public institutions	• Theoretical background
	• Talent capture programs			• Possibilities of Master and PHD about tourism
Key intervention areas:	• Appreciation of the social image of tourism professions		• There were elaborated vocational standards for tourism professions	**Weaknesses**
• Introduction of new curriculums	• Incentives for public and private players to bet on training and qualify their employees to the various hierarchical levels.		• Training programmes must follow vocational standards	• Lack of practice
• Setting up of national network of Centers of excellence for tourism and hospitality education.			• There were authorised a great number of providers for tourism training for adults	• The foundation place of tourism faculty or high school out of touristic places
• Greater involvement of employers in articulating training needs and participating in education process.	• Projects usually developed in small and medium-sized schools;		**Weaknesses:**	• Lack of academicians
Core-vet addresses these challenges by:	• Innovative pedagogical model based upon a "modular structure";		• The level of competencies of tourism workers is very low	• Lack of practice area or equipment (Hotels etc.)
• Facilitating wide-ranging access to the training material for learners, teachers and employees through e-teaching approach promoting learning any-time and anywhere at the speed self-paced by learners.	• Adoption of an individualized pedagogy focused on the respect for different learning rhythms;		• Vocational training providers have not enough practical experience in tourism	• Lack of guidance of job,
	• The curricula include internships;		• training providers do not emphasize practical training of students;	• The problem of being mandatory to study in the field of not wanted area because of the university exams (this is general problem of education system)
	• Relevance of the relationship between school and the world of work;		• Practical training does not meet international standards	• Tourism education in university is not integrated with sector (most of the owners of restaurants and hotel address and emphasize this point)
• Made learning material available to a huge number of micro and small businesses that prevail in tourism and hospitality sector that, traditionally, do	• Existence of an Advisory Board on which corporate and union associations have a seat. **Weaknesses:** • To improve the basis of transformation and competitiveness of the national tourism sector it		• Training programs are not flexible enough	• After graduation, most of the graduated students don't want to work in tourism sector because of low

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10 What are the main qualification challenges? What are the strengths and weaknesses of education and training, particularly in TourismSME?

not have access to most of the training coursed provided commercially.	is necessary, in terms of human resources, develop actions in five keys areas: • Ensure articulation and transparency of training • Adequate the training to the new realities of the sector • Support the business sector transformation • Encourage continuous improvement of the training offer • **Managing/ organising/ company leadership**; • **Communication and interaction with clients**; • **Other subsector transversal skills** (Example: teamwork and managing workplace relationships).	• The positive effects of the training are cancelled by migration of workforce • Managers do not pay enough attention to supervision and guidance in the workplace	salary, work condition, or low position job (most of the owners of restaurants and hotel address and emphasize this point)

Typical Qualification of TouriSME Managers/Owners[11]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		

There is no verified data about the qualification of the SME managers in the tourism sector in Croatia.
 	
Our estimation is:
 	
    80% with secondary school
 	
    20% with higher education
	Based on a study prepared by the Research Centre of the Institute of Economics and Management Portuguese, most of the Portuguese entrepreneurs have less 8 years of education (low-skilled).
	There is no verified data about the qualification of Tourism SME managers/owners, we can extrapolate using the general schooling data of Portuguese employers:
	• 80% lower than secondary;
	• 10% secondary;
	• 10% higher education.
			No statistics available.
			A restaurant or hotel unit is not allowed to carry out activity if the director does not hold a tourism licence.
			Tourism license is obtained in the following cases:
			The manager is a graduate of a faculty / college accredited in tourism profile and have minimum 2 years' experience in tourism or management completed a training course lasting at least 6 months, (completed) after 1990
			The manager has graduated from a university / college in the field of tourism and proves that he held a leading position in a company from tourism for a minimum of 2 years or practiced at least 3 - 5 years skilled jobs in tourism
			The manager is a graduate of a post high school or college in the field of tourism and prove at least 3 years' experience in a management position in a company from tourism or practiced for 4- 7 years skilled jobs in tourism; completed a
				• 25% of the managers of 4-5 stars hotels are graduated from high school
				• The other % 25 of them are graduated from 2 years programs of universities
				• The rest (% 50) of them are graduated from different bachelor degrees or 2 years programs of universities which are out of tourism fields
				• Most of the managers(we discuss), they describe that about all the owners of hotel except chain hotels or institutional ones have not interested in tourism before and they are not graduated from a tourism schools and they didn't take any tourism education

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11 Please describe the typical qualification of Tourism SME managers/owners

| | | training course management in hotel industry and tourists since 1990
 • Holds a certificate of proficiency in a foreign language
 • For pensions is necessary that at least one person employed to have completed a training course for tourist hostel Administrator, Level 2 qualification (minimum 720 hours of practical and theoretical training) | |

Training of Staff[12]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		
SME managers are trained for giving feedback to their employees, on training they are giving feedback to real employees with real assessments. Also, if it is training about, for example, Customer intimacy, they attended to this training together. We can estimate that 30-40% training of SME managers include training of staff	• The management of human resources it is always approached on Business Administration degree, as well as in Advanced management programs for competitiveness. • Curricula in the Business Management Course, level 5, include training in Staff Management/Human Resources. Besides these, there are specific training units, short duration, promoted by corporate associations, enterprises and schools.		• no accurate statistics available. • In Romania, in order to be employed in any position, any person must prove professional training or professional experience in the field. • Employers must ensure constant staff training at least once at every two years (not necessarily meaning that it really happens in practice). • Wide offer of free training for employees through European Social Fund for HR Development (FSE POSDRU), including training / initiation / specialization or uncertified training (at least 10 strategic project including at least 2 development regions were identified and also a lot of projects includes trainings for one or two or more occupations in tourism)	• To some extent, yes; The managers (we discuss) describe that we give meeting or briefing to our employee once a week or once a month including hygiene, discipline, job security etc. they describe that firstly we must know so that we can teach something to our employees so they take education firstly and then they transfer the information to employees. • **We can estimate that 35-40% training of SME managers include training of staff.**

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12 Does the training of SME mangers include training of staff? If yes, to what degree (proportion of training program, part of exam?)?

Support Structures : Organisations/Institutions/Service Providers[13]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		
- Ministry of Tourism - Ministry of Science, Education and Sports;, - Ministry of Entrepreneurship and Crafts - Croatian Employment Service; - Regional development agencies - Tourism Institute - Croatian Chamber of Economy - Business incubators - Open Universities - University College for Economics, Entrepreneurship and Management Nikola Subic Zrinski; etc. - Private consulting companies **All support training in SME, and their services are in demand.**	Turismo de Portugal's mission is as follows: - Enhancing and developing tourism infrastructures; - Developing human resources training; - Supporting investment in the sector; - Coordinating Portugal's domestic and international promotion as a tourism destination; - Regulate and inspect betting activities. - Using its privilege relationship with other public bodies and economic agents in Portugal and abroad, Turismo de Portugal is dedicated to fulfilling its objective of strengthening tourism as one of the core growth engines of the Portuguese economy. There are also corporate organisations (Example: Chamber of Commerce), companies and schools that provide training to Tourism SME, as well as to general companies. The existing offer, usually short duration units, can already be defined or structured according to the SME's needs.		- National Tourism Authority is the governmental structure dealing with Romania's tourism activity. Main tasks are: - Developing strategies, promoting and developing plans for tourism - Authorizing economic operators and specialized personnel in tourism, classification tourist reception etc. - Inspection activities in the tourism and leisure industry, as required by law - There are private associations of tourism operators, of which the best known and most active are ANTREC - National Association of Rural Ecological and Cultural and ANBCT Romania - National Association of Chefs and Confectioners of Tourism, ANAT – National Association of Travel Agencies.	- Ministry of Tourism - Ministry of National Education - Regional Development Agencies - Universities - Ministry of Youth and Sport **All support training in SME, and their services are in demand.**

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13 What support structures (organisations/institutions/service providers) exist for TourismSME? Do they support training in SME? Are their services in demand?

Main Qualification/Competence Gaps[14]

CROATIA	PORTUGAL	ROMANIA	TURKEY
	AZORES REGION VIANA REGION **a) formally trained staff in TourismSME** - Interaction with clients in a differentiated manner considering their demands and the growing multiculturalism (attitude, friendliness, communication, including foreign languages, presentation, proactive behaviour, adapting to client diversity, problem solving and complaints ...); - Integration of commercial/ promotion/ sales components in interaction with clients, controlling costs and optimizing resources. **b) staff without formal training** - Basic technical skills, just partially supressed by internal Informal Training; - Teamwork and management of workplace relationships; - Flexibility and adaptability to professional situations and technological evolution; Openness to lifelong training (availability, motivation and learning context).	**a) formally trained staff in TourismSME** - The level of competencies of tourism workers is very low - Training providers do not emphasize practical training of students; - Practical training does not meet international standards **b) staff without formal training** In Romania there are very few workers who have not received a form of formal training.	- The managers (we discuss) tell us that especially tourism graduated students don't want to work with us because of low job position. - They tell us that graduated students don't want to work in low position, they want to work in manager positions but the manager positions are limited and we cannot employ someone as a manager without job experience before. - If you want to be a manager, you came from core of job, namely firstly you must work in the lowest position and then gradually rise to manager position, if you don't work in low position then you can't manage that department, you can't understand the lack or necessities or you can't control the employee under you. - They describe that the universities mostly give theoretical education so the students can't progress practical skills and we need practical skilled

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14 What are, according to the literature and your preliminary expert assessment the main qualification/competence gaps found in :a) formally trained staff in TourismSME | b) staff without formal training?

| | **Key Competency Areas to develop :** | | personals. They describe that it is more important for us practical skills rather than theoretical skills. |

Key Competency Areas to develop :

Management / Organization /

- Think products or services (market analysis, engineering and product innovation associated with the effort of diversification and differentiation);
- Monitor the activity and results (management control);
- Integrate and capitalize ICT on the management and organization of business (reservations , payments , management support tools ...) ;
- Diversifying promotion channels and online marketing and monitoring results;
- Manage prices and revenues (yield / revenue) in the sense of maximizing the economic efficiency of operations;
- Participate in professional interaction networks extended which includes the relationship of ease and knowledge about other cultures;
- Manage and develop work teams (including strategic approaches to skills development) ;

Communication and interaction with customers:

- Interact with customers differently responding to the demands and the growing multiculturalism (attitude , friendliness , communication, including foreign languages , presentation, proactive behaviour , adaptation to the diversity of customers , problem solving and complaints ...) ;

- Especially in coastal parts, the tourism industry is mostly seasonal. Therefore the people working in tourism sector have a fear of unemployment after tourism season (6 moths). The most important problem of sector is lack of qualified staffs. So with fear of unemployment after 6 months, the employees feel tourism sector a temporary job so they look for more permanent jobs. The mangers describe that after we educate the staff, he/she find a different or much more permanent job. So we can't find qualified staffs

	• Integrate the commercial component / promotion / sales interaction with customers , control costs and optimize resources ; **Other soft skills to sub- sectors:** • Work as a team and manage labour relations ; • Openness to learning throughout life (availability , motivation and learning context); **Specific technical skills of different sub-sectors :** • Restoration : Prepare and create appealing menus and aligned with the commercial policy; Improve the wine service advice ; Openness to innovation in food production (trends , technologies and techniques); Apply ICT in restoration; • Hospitality: Reserve and trading management services on-line; • Other tourist activities : Operating with different marketing systems and reserves; Designing / schedule tours , including advice for building custom scripts ; Inform and guide to the historical, heritage and environmental resources ;		

Projects focused on the 8 Key Competencies[15]

CROATIA	PORTUGAL	ROMANIA	TURKEY
• ETF project: Key competences for lifelong learning, 2006 – 2007 • Student Business Incubators:are established by universities, representing a link between academic and business world and having a supportive environment through professors acting as mentors of student companies • Lifelong Learning Program: Croatia has started with the preliminary implementation of the lifelong education program which enables Croatian educational institution to participate in the biggest European program in the field of education.	**AZORES REGION VIANA REGION** Between 2010-2011 there was a pilot initiative developed, funded by the Human Capital Operational Programme, under the name **Training for Businessmen**. This initiative aimed to strengthen and develop the entrepreneurs skills of micro, small and medium enterprises , by conducting training activities and counselling that meets their needs in order to improve their management capacity and increasing competitiveness , modernization and innovation capacity of the respective companies The training for entrepreneurs focused in two types: • Management skills - base level – For entrepreneurs with needs to acquire basic management knowledge (regardless of education level); • Management skills – advanced level - For entrepreneurs that have the secondary education as minimum qualification. The initiative was implemented by associations (business and regional development) , technology and training centers and institutions concerned for	• Part of the projects focused on the 8 competencies were achieved in human resource development projects funded by FSE POSDRU. These projects are not focused on the 8 competencies, but they have been achieved partially in the programs of training / specialization / initiation carried out. • We have no knowledge about a project that is focused on the eight key competencies achievement.	• Turkey Life Long Learning Strategy Document 2014-2018 Action Plan (published in Official Gazette of the Republic of Turkey), some results of report • The top arrow show EU and below arrow show Turkey as lifelong learning changing rate according to years, it is seen that in Turkey lifelong learning rate is very low when compared with EU but there is a continuous progressing according to years for Turkey

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15 Have there been projects to foster the acquisition of the eight key competenccies for life long learning in your country? If yes, please describe main outputs and give references.

innovation and entrepreneurship . **The pilot phase reached 7,200 companies and 4,000 entrepreneurs. 97% of participants reported recommend the program. (VR)**

In Portugal currently exists the National Agency ERASMUS+, Education and Training, which aims to ensure the management of the ERASMUS+ programme in education and training, as well as ensure the management and fulfilment of the activities of the still in force Lifelong Learning Programme (PALV), Erasmus Mundus and Tempus IV Programmes.

According to data from the National Agency, in the Lifelong Learning Programme, in 2013 17.889 Portuguese were involved in mobility activities in all programmes (Erasmus, Comenius, Grundvig, Leonardo). **A raise of more than 6% when compared to 2012. Just in Erasmus, in 2013, 10.099 Portuguese students lived the experience of studying in foreign Higher Education instititions.**

Portugal has received 9.896 foreign students in the same year in its Higher Education Institutions.

Other than these, **the eight key competencies are adapted and included** in school curricula, since elementary school**.(AR)**

Projects to foster the qualification and learning of Tourism SME Staff[16]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		
• Adriatic project:education in hospitality and tourism. • Brittish Council project:Skills for employment in tourism and hospitality. • Many tourist communitys are organizing free education to local needs.		• Training - action programs for SMEs , financed by POPH . This program is not unique to the tourism companies , but they can also participate . • The same is done to the needs of businesses and aims to increase the capacity of management, improving the organization and competitiveness of SMEs. • The methodology of Education - Action presents moments of classroom training , interspersed with moments of individualized consulting , featuring lead to formation "inside " of the company , enhancing the involvement not only of the businessman but of the entire organization . In this methodology , the training process is focused on business issues and projects , **and participants consolidate their learning , analyzing and applying the knowledge acquired in the classroom training in concrete problem solving and the development of defined projects.** • Technical training units are common and frequent, promoted by corporate organizations,	• There are many projects in all regions of Romania that targeted improving skills of people working or wishing to work in the tourism industry by providing training programs for specific occupations in tourism. • It is estimated that through these projects were trained hundreds of people nationwide.	• Antalya municipality conducted a project including the young graduated from secondary school among 15-29 in order to participate in workforce called Course of Educating Qualified Staffs in Tourism Sector that is an EU project under the Promoting Youth Employment. 60 unemployment young (at least 10 visually impaired and 20 girl) take education of being assistant of service staff and masseur and after the education the project supply the facility of probation, after the project at least 30 youth are expected to work in tourism sector (http://wwwremote.ikg.gov.tr/). • Project called New Opportunities for Youth and Women, TURSEM: Tourism Continuing Education Centre Project (dokumanlar.antakyatso.org.tr). • Multiplying the samples is possible. Most of Local Government supports this kind of education programs

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16 Have there been projects to foster the qualification and learning of Tourism SME staff? If yes, please describe main outputs and give references

	with the purpose of increasing the level of qualification of Tourism SME's employees and managers. These actions, usually short duration, are varied and very wide-ranging, within, for example, the following themes: • Implementing and maintaining HACCP; • Organization of safety and health plans in the company; • Entrepreneurship and corporate organization.		

The State of the Art of facilitated (informal) Learning at the Workplace[17]

CROATIA	PORTUGAL		ROMANIA	TURKEY
	AZORES REGION	**VIANA REGION**		
	- Portugal was integrated in the European Iventário of Learning Validation Formal and Informal among the three most advanced countries in Europe in terms of the legal framework , practices and number of certified candidates . - In 2001, the National System of Recognition, Validation and Certification (RVCC) was established , and currently the Recognition, Validation and Certification is an important part of the measures designed to achieve the goals set by the New Opportunities initiative . - In April 2010 324370 adults have been certified through a RVCC process (ie , as a result of a supplementary validation process and training) . **(VR)** - It is very common considering the type of hiring, the strong seasonal spread that affects the sector and the training insufficiencies that still exist. - Being precarious employment very frequent, where workforce "transits" from sector to sector according to its needs, the (non-formal)		- The concept of workplace learning has been widely used before 1998 in all fields. - Therefore, managers who practiced at the time, know these training methods but they do not apply for various reasons (material basis not enogh developed, leading very small units etc). - Younger managers know in theory the methods of learning in the workplace but they do not have practical knowledge for applying/using and do not apply them consciously and programmatically.	

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17 Please describe the state of the art of facilitated (informal) learning at the workplace in your area. Are you familiar with the concept? Is it used widely? Are there institutions/organisations supporting such learning?

	training is mostly done by the hiring companies. • On the other hand, it works as a complement to formal training, namely when internships or early work contracts occur, as a temporary way of adapting to the company and the work position. • **Are there institutions/organisations supporting such learning?** • In the region (Azores) no.		

3.3 Survey of SME

3.3.1 Aim, Scope and Methodology of the Survey

In order to validate the findings of the prior desk rserach and focus group research, the partners of TouriSMEComp inplemented a survey among relevant hotels, restaurants and other tourism SME in their respective regions.

Thee Qustionaire for the survey (cf. annex) was developed by the IO 1 coordinator ISOB.

The questionnaire includes the parts to follow:

Q 1 collects contact data of the respondent.

Q 2 – Q 4 characterise the establishment respondsing with regard to size, field of business, tradition etc.

The questionnaire gous on to ask for information about the owner/manager responding, his/her own educational background and experience.

This information is relevant to get an idea about the level and kind of experience of one of the main target groups, which will reveal requirements for shaping the materials aimed at this traget group, which have to be developed.

Q 7 – 8 are meant to help the development team to better understand the quality of the respective establishments, as percieved by customers, as well as the audience of the hotels and restaurants.

Q 9 – 11 look into the educational background of employees as well as their main motivation for working in the respective establishement.

Also this information is relevant to get an idea about the learning prerequisites and anticipated motivation of the second relevant target group of the project.

Q 12 – 16 are devoted to identifying the learning needs of employees, as perceived by the owners/managers.

Q 13 identifies the most relevant characteristics employers expect to see in their employees. This will be relevant for finding the right balance between the formation of specific skills and the development of more general attitudes and characteristics, as well as the often-cited "soft-skills".

Information from Q 14 and 15 will be used to get an idea of the level of resources devoted to learning within the company. Q 15 in free format allows respondents to describe what they regard as the most relevant current learning arrangements used by them.

Q 16 is the core part of the survey. According to the application, TouriSMEComp will foster learning in the workplace as a means to improve the productivity of SME, but at the same time to build and further develop the key competences for life long learning in employees, in particular those with lower academic qualifications.

Therefore the respondents are asked to assess the relevance of critical elements of the 8 key competences for life long learning, which will allow the development team to prioritise the fields of learning within the project. The elements of the key competences follow the structure provided by the European Commission, but formulate these elements in a way that will be familiar to the respondents.

Finally, questions 17, 18, and 19 aim to help the development team to better understand what are the main challenges and opportunities the owners/managers feel they have at this time.

Q 19 gives space to communicate any concern or suggestion to the team.

The operational partners

- send a questionnaire, developed by the activity leading and translated to the national languages by the partners to as many Tourism SME as they saw fit to assure a turnout of **at least 20 Tourism SME**,
- partners collected the answers,
- translated answers to English and
- uploaded the data to an online survey system provided by the IO leading organisation.

91 answers were received, 20 from Croatia, 32 from Portugal, 20 from Romania and 19 from Turkey.

The results obtained claim to be descriptive only. The survey did not aim at achieving an representative sample of Tourism organisations, but rather focused on obtraining quantitative, and comparable information from partners which will probably be part of the group testing the products.

The aim also was to identify common characteristics and learning needs, which should be the main part of the learning material, while all partners will be free to adapt and supplement this core material with country specific material if needed.

The responses have been analysed by crosstabulations, which are documented in the annex to this report for reference. Where ever the differences between countries showed to be less relevant, the overall results are reported in the main text of this analysis, while remarkable differences will be mentioned whenever they appeared to be relevant.

3.3.2 Characteristics of Sample

3.3.2.1 Kind of Establishments surveyed

CT Establishment*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Establish-ment	Restaurant/Bar/Inn	Number	12	17	2	11	42
		% in Country	60,0%	53,1%	10,0%	57,9%	46,2%
	Hotel	Number	3	11	8	7	29
		% in Country	15,0%	34,4%	40,0%	36,8%	31,9%
	Hotel and Restaurant	Number	5	2	10	0	17
		% in Country	25,0%	6,3%	50,0%	0,0%	18,7%
	other	Number	0	2	0	1	3
		% in Country	0,0%	6,3%	0,0%	5,3%	3,3%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

Nearly half of the respondents manage or own restaurants/bars or inns, just under a third hotels and about 20% are hotel-restaurants.

While restaurants form more than half of the group in most partner countries, in Romania there are only 2 of them included. Here 90% of the establishments surveyed also offer accommodation.

3.3.2.2 Size of Establishments

CT Group*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Total Size Group	1-4	Number	0	9	5	1	15
		% in Country	0,0%	28,1%	25,0%	5,3%	16,7%
	5-9	Number	1	10	3	3	17
		% in Country	5,3%	31,3%	15,0%	15,8%	18,9%
	10-19	Number	11	8	5	6	30
		% in Country	57,9%	25,0%	25,0%	31,6%	33,3%
	20-29	Number	4	4	3	3	14
		% in Country	21,1%	12,5%	15,0%	15,8%	15,6%
	30 or more	Number	3	1	4	6	14
		% in Country	15,8%	3,1%	20,0%	31,6%	15,6%
Overall		Number	19	32	20	19	90
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

85% of respondents represent smaller operations with up to 29 employees.

About one third of the group can be regarded as "small" (up to nine), while a third sits right in the middle, employing 10-19.

While in Croatia and Turkey the sample includes more mid to larger size establishments, in Portugal and Romania small and very small hotels and restaurants are the core group of respondents.

3.3.2.3 Tradition

As part of the characteristics of the group of potential development and piloting partners the tradition of the establishments is relevant. While hotels and restaurants with a long tradition can be expected to have well established procedures and habits, which obviously allowed them to find their place in the market, newly opened establishments might be more open to development, but have yet to prove their sustainability.[18]

Restaurant

CT ExistenceRestaurant*Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
Existence of Restaurant	-5 y	Number	2	4	4	8	18
		% in Country	15,4%	20,0%	28,6%	72,7%	31,0%
	6-10 y	Number	5	5	3	1	14
		% in Country	38,5%	25,0%	21,4%	9,1%	24,1%
	>10 y	Number	6	11	7	2	26
		% in Country	46,2%	55,0%	50,0%	18,2%	44,8%
Overall		Number	13	20	14	11	58
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

Just under half of the restaurants in the sample exist for more than ten years and can be regarded as well established. This group is largest in Portugal.

In Turkey, newly established restaurants form over 70 % of the group.

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[18] Hotels and restaurants in the tables to follow have been added to the restaurant only and hotel only groups, as a differentiation between employees groups in the hotel and restaurant parts of the establishments have not be made in order not to overcharge the respondents. There are missing values in all of the variables (identified in the full data report available on request). Valid answers are not identical in the respective tables therefore

Hotel

CT Existence Hotel *Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
Existence Hotel	-5 y	Number	3	2	3	2	10
		% in Country	50,0%	15,4%	18,8%	28,6%	23,8%
	6-10 y	Number	1	2	7	2	12
		% in Country	16,7%	15,4%	43,8%	28,6%	28,6%
	> 10 y	Number	2	9	6	3	20
		% in Country	33,3%	69,2%	37,5%	42,9%	47,6%
Overall		Number	6	13	16	7	42
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

The situation is not much different regarding the hotels, however here also in Turkey the well established places dominate, while the Croation sample includes 3 newly established hotels, which is 50% of hotels included in Croatia.

3.3.3 Educational Background of Owners and Managers

As managers and owners, according to the approach of the project, are foreseen as main catalysts of learning in their establishments, their educational background is relevant.

Management approaches which build on a theory based University education in tourism might be quite different from the approaches choosen by owners and mangers who build on long practical experience.

Respondents described their educational background verbally. The responses have been coded by the authors. The accuracy of this is dependent on the understanding of the question. Therefore the values of "secondary school only" might be overstimated, if respondents did not report further education.

Dependent on the educational systems in the partner countries secondary school might also have included tourism specific tracks of vocational education.

CT Educational background*Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
Educational background	secondary school	Number	13	14	3	9	39
		% in Country	65,0%	45,2%	15,0%	50,0%	43,8%
	non-univ tourism specific	Number	1	8	1	0	10
		% in Country	5,0%	25,8%	5,0%	0,0%	11,2%
	University Tourism specific	Number	4	2	4	2	12
		% in Country	20,0%	6,5%	20,0%	11,1%	13,5%
	University Econ Management	Number	2	1	6	3	12
		% in Country	10,0%	3,2%	30,0%	16,7%	13,5%
	University other	Number	0	4	5	4	13
		% in Country	0,0%	12,9%	25,0%	22,2%	14,6%
	other	Number	0	2	1	0	3
		% in Country	0,0%	6,5%	5,0%	0,0%	3,4%
Overall		Number	20	31	20	18	89
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

43,8% of respondents report secondary school as highest educational attainment.

Just 13,5% of owners/managers have tourism specific University degrees.

Almost 30% of respondents have other University education.

Romania stands out here, as 75% of respondents report University degrees, which are also quite common in Turkey.

3.3.4 Quality Ratings and Customer Feedback

The newly established booking and tourism advisor websites, which allow customers to rate the quality of establishments they have visited, allows for an assessment of the quality of the establishments, based on feedack by their customers.

While the quality of this feedback may be controversial and can not be regarded as the "truth" about the hotel or restaurant in every case, bad ratings on the leading portals must for sure be a concern for each owner and manger of a hotel or restaurant.

Therefore it seems to be relevant to know the overall situation of our sample with regard to this quality perception. This might determine if the business is in trouble or if quality problems necessitate a bigger learning effort.

Two leading portals, "Trip Advisor" and "booking.com" were selected as indicators.

Ratings are analysed as reported by the respondents.

47 respondents report their rating on tripadvisor and 27 on booking.com (hotels).

CT Rating on Trip Advisor*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Rating on Trip Advisor	good or excellent	Number	14	16	7	2	39
		% in Country	82,4%	88,9%	77,8%	66,7%	83,0%
	average	Number	2	2	2	1	7
		% in Country	11,8%	11,1%	22,2%	33,3%	14,9%
	poor	Number	1	0	0	0	1
		% in Country	5,9%	0,0%	0,0%	0,0%	2,1%
Overall		Number	17	18	9	3	47
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Rating on booking.com*Country

			Country			Overall
			Portugal	Romania	Turkey	
Rating on bookin.com	good	Number	10	6	1	17
		% in Country	90,9%	60,0%	16,7%	63,0%
	average	Number	1	3	4	8
		% in Country	9,1%	30,0%	66,7%	29,6%
	poor	Number	0	1	1	2
		% in Country	0,0%	10,0%	16,7%	7,4%
Overall		Number	11	10	6	27
		% in Country	100,0%	100,0%	100,0%	100,0%

Very few hotels and restaurants report a bad rating.

The sample studied represents higher quality establishments. While not all of the hotels and restaurants reported their rating, those who did report over 85% good or excellent ratings in the case of tripadvisor and 63% good ratings for booking com.

The project therefore will be able to work with establishments which proved to be able to provide good to excellent services and are obviously among the leaders among their peers.

The quantitative information is complemented by information about the feedback on strength and weaknesses as recalled by the respondents.

These are first pointers to potentially problematic araes, where learning and qualification efforts could contribute to improvements, while information on strenghts may show areas where exellence has already been achieved. The latter could serve as benchmark areas for the improvement of other areas.

Strength and Weaknesses Croatia

In Croatia good food, friendly staff and good price ratio are mentioned several times.

Weaknesses include dated interior as the main concern and perceived unprofessionalism of staff and intercultural issues like acceptance of smoking as individual criticisms.

Strenghts and Weaknesses Portugal

In **Portugal** location, cleanlieess and friendlieness of staff stand out as positive factors.

Weaknesses are few and individual, as perceived slow service, lack of parking or internet as well as infrastructural factors and high airfares to the location.

Strenghts and Weaknesses Romania

In Romania the cleanlineess is the most often mentioned strength, along with location and the quality of staff.

Weaknesses include infrastructure like parking, slow service and a lack of tourism activities. Most of the weaknesses are mentioned only once, no clear pattern of critizisms is evident.

Strenghts and Weaknesses Turkey

In **Turkey** cleanlieess, hospitality and staff are mentioned as strenghth several times, while the few weaknesses include location and delays.

3.3.5 Origin of Customer

The origin of customers is relevant for the fields of competence that have to be developed. Foreign languages and intercultural competence is more important in establishments with a higher rate of international customers. The development of these skills may open new markets in the future, however.

CT Percentage of international customers*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Percentage of international customers	-25%	Number	4	11	7	11	33
		% in Country	20,0%	40,7%	41,2%	64,7%	40,7%
	26-50%	Number	5	13	7	2	27
		% in Country	25,0%	48,1%	41,2%	11,8%	33,3%
	51-75%	Number	10	3	2	3	18
		% in Country	50,0%	11,1%	11,8%	17,6%	22,2%
	>75%	Number	1	0	1	1	3
		% in Country	5,0%	0,0%	5,9%	5,9%	3,7%
Overall		Number	20	27	17	17	81
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

Just over 40% of establishments surveyed have only few international customers (up to 25%).

For more than half of the sample, international customers are a highly relevant target group, as they constitute up to 50% or even up to three quarters of the customers.

Intercultural competences and knowledge of foreign languages seems to be highly relevant in the majority of the hotels and restaurants to be involved in the project and therefore should be factored in when designing the project materials.

3.3.6 Establishments with relevant Group of Employees with lower Educational Attainment

In many countries the service industry in general and the tourism industry in particular is a gate to the general labour market also for groups with lower educational attainment.

Based on the formal criterion of a school education of less than 10 years, this group seems to be relevant only in Portugal. Here 19 establishments report that this group constitutes more than 25% of their employees. Also in Romania there are a few cases.

For the case of Portugal, the issue of low school attainment is well known. Mostly the older population is affected, since this generation received its education before 1974, when education was not yet a priority of government policy.

CT more than 25% employees with less than 10 years of school*Country

		Country		
		Portugal	Romania	Overall
more than 25% 1,00 employees with less tha 10 years of school	Number	19	4	23
	% in Country	100,0%	100,0%	100,0%
Overall	Number	19	4	23
	% in Country	100,0%	100,0%	100,0%

Obviously the obligatory school attendence regulations in the other countries have been effective, so that few hotels and restaunrants meet this criterion.

If this formal criterion can be interpreted as a negation oft he initial hypothesis, however, should be further studied by qualitive inquiries. The high demand for addional learning, which is apparent from the responses in the questions to follow, seems to point rather to an interpretation that a complete school education in itself does not equal the full development of all necessary competences.

On the other hand, the development exercises to be elaborated, obviously can build on a quite good level of basic competences on the side oft he majority of employees.

3.3.7 What does attract Employees to the Business?

Respondents were asked to describe in free format, what they think attracts their emplyoees to work for them. This question was meant to reveal the self perception of the employers with regard to the most important factors which need to be there to be an attarctive employer. It also reflects the perception oft he employers of the main motivation of their employees. The latter is relevant since the personel development strategy will be different, depending on the perception of intrinsic versus extrinsic motivation being predominant.

The free format answers – multiple answers were allowed - were clustered into seven main groups: Salary, working conditions, work schedule, reputation, training opportunities, good team, attractive content of work and other.

In **Croatia**, salary and working conditions are mentioned 8 times each. Four times the repuation of the place is described as an important factor and two times the attarctiveness is built on a good team.

Also in **Portugal** the salary predominates as an motivational factor. It is mentioned 11 times. Other factors include working conditions (6), attarctive work content (5), good team (4), reputation (3) and training opportunities (1).

In **Romania** the motivation through the salary is less apparent (3) and general "working conditions" (10 are more often mentioned. Other factors as the work schedule (5), reputation (4) and "good team" (4) also seem to be important. Only 2 employers mention the attarctive content of work.

In **Turkey** the importance of the salary (17) predominates. Almost all of the resondents mention this as the most important factor. Others include the working condition (7), good team (3), training opportunities and schedule (2 each) are also mentioned. Only 1 employer mentions the content of the work.[19]

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[19] See annex for a table of clustered categories

While these results should not be over-interpreted and some resondents may have answered in a way that seem "realistic" to them, for the external observer **the low number of mentions of the content of work as main motivational factor is striking**.

More qualitative inquiry should be devoted to this.

Do employers really perceive an absence of professional pride and commitment to the profession in their employees? Are they motivated by money alone? Don´t employees love to be a cook or to service customers? Or can these factors been taken for granted and the frequent mention of "salary" just reflects the competitive position of each individual establishment?

If a lack of intrinsic motivation was the real situation, this would have to be a main factor for the learning program and an issue that should be discussed in depth with consultants, owners and employees alike.

3.3.8 Recruitment Problems: Are you able to hire?

The necessity of workplace learning, while learning and developing must be a priority of each sustainable business, always depends on the opportunity to hire staff from the labour market, which matches the needs of the respective business.

CT Are you able to hire the kind of people you think you need/regard as desirable?*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Are you able to hire the kind of people you think you need/regards as desirable?	Almost always	Number	0	8	1	6	15
		% in Country	0,0%	25,0%	5,6%	31,6%	16,9%
	Mostly	Number	12	6	3	7	28
		% in Country	60,0%	18,8%	16,7%	36,8%	31,5%
		Number	8	14	11	3	36

Sometimes it is hard	% in Country	40,0%	43,8%	61,1%	15,8%	40,4%
I almost never find employees with exactly the right profile	Number	0	4	3	3	10
	% in Country	0,0%	12,5%	16,7%	15,8%	11,2%
Overall	Number	20	32	18	19	89
	% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

In the sample surveyed, substantial problems to hire staff with exactly matching profiles, is clearly evident. Only 16,7% of respondents claim that they can "almost always" find adequate personel.

Just under a third seems to be more or less satisfied, while more than 50% say that it is „sometimes" hard (40,4%) to find the right people, or even claim that they almost never find these (11,2%).

Based on these responses a high investment in training seems to be even more important.

The problem is more relevant in some of the partner countries.

While in Turkey two thirds of employers are quite satisfied with their recruitment opportunities, particularly in Romania recruitment problems seem to be quite serious (77,8%), which is also true for Portugal, while on a lower scale.

3.3.9 Training Efforts

The difficulties to find the right staff seems to suggest the necessity of intense training efforts.

In fact the hotels and restaurants report quite spectecular rates of laerning. Asked about the percentage of working time devoted to learning, almost 50% of establishments report that more than 20% of the working time was relevant for learning.

Only 13,5% say that under 5% of the working time is relevant for learning.

CT Percentage of Working Time devoted to learning*Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
Percentage of Working Time devoted to learning	under 5%	Number	4	3	2	1	10
		% in Country	22,2%	10,0%	10,0%	16,7%	13,5%
	5 to 9	Number	10	1	2	1	14
		% in Country	55,6%	3,3%	10,0%	16,7%	18,9%
	10 to 19	Number	3	4	6	0	13
		% in Country	16,7%	13,3%	30,0%	0,0%	17,6%
	20 to 29	Number	1	8	7	1	17
		% in Country	5,6%	26,7%	35,0%	16,7%	23,0%
	30 or more	Number	0	14	3	2	19
		% in Country	0,0%	46,7%	15,0%	33,3%	25,7%
	don´t know	Number	0	0	0	1	1
		% in Country	0,0%	0,0%	0,0%	16,7%	1,4%
Overall		Number	18	30	20	6	74
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

Obviously the owners and managers surveyed factor in already that learning on the job is traditionally quite prevalent in the tourism industry.

Portugal and Turkey demonstrate particularly high rates of learning.

A look at the qualitative information about the kind of learning arrangements, however, shows that also other forms of more organised (non-formal) learning are quite common.

3.3.10 Learning Arrangements

What do the resondents understand by „learning arrangements" and which of these do they mention as those used in their establishments?

Croatia

In Croatia the arrangements to follow are mentioned:

- older workers train young workers
- managers usually teach less experienced workers
- experienced workers train less experienced workers
- sending workers on training courses
- managers and experienced workers usually train young and less experienced workers
- usually experienced workers and managers training less experienced workers
- we expect that our workers have the necessary skills for the job.if not,our managers will help them
- courses,workshops..
- managers train the workers
- managers are training workers
- courses,workshops,training from experienced workers
- managers train workers
- managers train less experienced workers.
- we expect that the people we employ know their job
- we expect that the people who work with us know their job.
- manager teaches workers

- manager train workers

Mangers are mentioned 8 times as those who train their workers.

Also more experienced workers are mentioned as "trainers" (5).

Courses are mentioned just three times.

Three respondents explicitly expect "ready" employees, which do not need additional training.

Portugal

In Portugal the arrangements to follow are mentioned:

- Practical and theoretical
- Practice
- The older staff gives training on waiter skills, security and hygiene.
- Safety practices and safety at work
- HACCP Specific training in the area - serve tables, kitchen, etc...
- HACCP training
- Languages, techniques and security
- Formation in a work context
- Internal (internal operating rules, security) and external (languages, attendance, cuisine/restaurant, HACCP, etc...)
- Practical ant technical training, behavior training - coaching/leadership
- Software, HACCP
- There is no necessity. We work with the same team for several years.
- All levels and types of training (F.e: training with Ubiseg for the kitchen and restaurant staff).
- Transmitting knowledge through demonstration.
- How to be,being and talking with clients.How to deal with the reserve management, security and hygiene at work.
- It is company policy the constant training
- Company's operation
- Public attendance

- All employees have 35 hours of annual training
- All employees have 35 hours of annual training
- Customer service
- Training by management
- Food security/Firefighting/Basic life support/Housekeeping/Pastry/Cooking
- Every three-month training in booking system and every six-month training in accounting.
- Training events of the local Chamber of Commerce.
- Reception and housekeeping.
- Training in restaurant servisse.
- Customer service, conflict resolution, training in computer platforms.
- Employees are continually accompanied in the workplace.
- Regular meetings with all employees
- Work environment organization and cleaness

Seven times training through practice is mentioned. However, the topics of training are mentioned by the Portuguese respondents more than methodologies. 35 hours of training (a legal requirement) is mentioned.

Among the technical skills security, accounting, language, but also soft skills as cusomer communication are mentioned.

On the whole the high number and detail of the answers reflects an already quite elaborate level of learning efforts in Portugal, on which the project can build its efforts.

More information about the training taking place and an exchange of experiences can be expected to provide important input.

Romania

In Romania the arrangements to follow are mentioned:

- Verbal instruction and practice
- Information, discussion whenever required
- Organization of trainings, seminars, work shops
- Group training sessions, Individual training sessions
- Learning centers
- practical work
- discussions, explanations, tips
- courses conducted by professional companies
- training conducted by manager, discussions to identify issues that need to be improved
- Training courses, training conducted by experienced employees
- workplace training, monitoring
- teaching and learning of different skills at work
- meetings with departments and show exactly what to do
- courses
- discussions, observation
- demonstrations, meetings
- 0

In Romania four times formal trainings are mentioned. Verbal instruction (obviously by managers as well as group sessions, discussions etc are frequently mentioned.

Obviously there is a culture of reflection and collective learning, which is in to some degree self-organised by the company.

Also this can be a good foundation for further efforts to extend and systematise this kind of training.

Turkey

In Turkey the arrangements to follow are mentioned:

- weakly and monthly meetings and briefing about first aid, safety, hygiene according to needing of deparments
- weakly anf monthly briefing and meeting
- once a week information about appearance, hygiene
- weekly and monthly, according to deparments it changes such as hygiene, safety
- weekly and monthly meeting
- every day about 1 hours orientation, hygiene, safety
- about 45 minutes daily meeting monthly hygiene, safety educations
- every day 2 hours such as dialogue skills, safety,
- there is daily meeting lasting 1 hour our staff work 9 hours in a day we give them meeting about service, hygiene, safety, kitchen education
- first aid, safety, fire education
- briefing and meeting such as hygiene , safety, pleasure of clients
- every day about 30 minutes meeting
- about 30 minuted in a day about evaluating of the day
- weekly and monthly meeting anout present situations, conditions, problems what to do
- daily, weekly, monthly meeting try to incerese of motivation and performance of staffs

In Turkey the main means of learning are meetings with the staff. They take considerable time (from 30 min upward).

Health, safety and hygiene are the most mentioned topics, but also customer communication is mentioned. Some respondents also mention the importance of a general orientation of the staff "about the general situation".

Also the forms of common learning reported from Turkey can be viable starting points for further initiatives. Details of the current practices should be further explored.

3.3.11 Most important Learning Needs

In order to develop useful material the partners of TouriSMEComp need to get an idea about the perceived learning needs in hotels and restaurants.

As the project aims to foster the acquisition of key competencies for life long learning, rather than individual professional skills, the perception of the importance of such skills on the side of the owner s and managers of hotels is of the utmost importance. Here a presentation of the accumulated results has been chosen, as the key competences related content of the material will be common in all of the partner countries.

3.3.11.1 Average Rating of Learning Needs

As the table to follow demonstrates, almost all of the key competences listed, are regarded as "Very significant" by the hotel and restaurant managers and owners.

Differences between categories are low. While this reflects some level of lack of differentiation while answering the question, it seems to be safe to interpret the results as a general appreciation of the competences listed.

Ideally an employee would have all of these qualities or should work to develop them.

What do you think are the most significant (important and urgent) learning needs in your employees _below_ management level, that should be addressed?

Communication skills in <u>mother</u> language	Very significant	Quite significant	Somewhat significant	Not very significant	Not significant
Writing	.... **I** .	....	....	....	....
Reading/understanding written instructions	.... **I**	....	....	....	....
Communication with customers	. **I**	....	....	....	....
Communication skills in <u>foreign</u> language	**Very significant**	**Quite significant**	**Somewhat significant**	**Not very significant**	**Not significant**
Writing	....	...... **I** .	....	....	....
Talking to customers	.... **I**	....	....	....	....

Counting and Calculating	Very significant	Quite significant	Somewhat significant	Not very significant	Not significant
Basic (calculating and checking bills, supplies etc.)	....**I**......	....	....	....	....
Advanced (Rule of three, creating Excel Sheets etc.)	....	........**I**.	....	....	....

Using Computer at Work	Very significant	Quite significant	Somewhat significant	Not very significant	Not significant
Basic (reading, printing, E-Mail, retrieving information, input information to templates)	.......**I**..	....	....	....	....
Advanced (installing programmes, Security, putting info online, producing complex documents	....	....	.**I**........	....	....

Learning to Learn	Very significant	Quite significant	Somewhat significant	Not very significant	Not significant
To have ambition and willingness to learn more	..**I**......	....	....	....	....

	Very significant	Quite significant	Somewhat significant	Not very significant	Not significant
Methods of self-regulated learning (learning with colleagues, reading job-related literature etc.)	...... **I** ...	....	....	....	....
To have the capacity to establish and follow learning objectives	.... **I** ..	....	....	....	....

Social and Civic Skills	**Very significant**	**Quite significant**	**Somewhat significant**	**Not very significant**	**Not significant**
General dexterity (ability to cope with new and unexpected situations)	... **I**	....	....	....	....
General "soft skills" as good manners, ability to show a positive attitude	.. **I**	....	....	....	....

Sense of Initiative and Entrepreneurship	**Very significant**	**Quite significant**	**Somewhat significant**	**Not very significant**	**Not significant**
General "pro-active" attitude	.... **I**	....	....	....	....

Acting "entrepreneurial" i.e. treating every customer as if it was the employees own business	...**I**... ...	....	....	....	....
Cultural Awareness	**Very significant**	**Quite significant**	**Somewhat significant**	**Not very significant**	**Not significant**
Ability to interact with and address the needs of customers from different cultural backgrounds	...**I**...	....	....	....	....

While almost all of the competences are regarded as „very significant" writing in foreign languages, advanced calculating and advanced use of the computer are the exceptions.

While also these are for sure important for some of the tourism employees, lower averages point to the fact that these competences are not regarded as basic competences that are to e expected from every employee, but are rather for the „specialists".

3.3.11.2 Rating of Relevance of Key Competences Ranked

Ranking of Learning Needs	N	Av.
Communication with customers in mother Language	91	1,13
Good manners, ability to show a positive attitude	91	1,20
To have ambition and willingness to learn more	91	1,23
Ability to cope with new and unexpected situations	91	1,30
Ability to interact with and address the needs of customers from different cultural backgrounds	91	1,32
Acting "entrepreneurial" i.e. treating every customer as if it was the employees own business	91	1,34
Talking to customers in a foreign Language	91	1,42

General "pro-active" attitude	91	1,43
Reading/understanding written instructions mother Language	91	1,46
Basic Counting and Calculating	91	1,46
Methods of self-regulated learning	91	1,62
Basic using the Computer at Work	91	1,70
Writing mother Language	91	1,74
Establish and follow learning objectives	91	1,74
Writing in a foreign Language	91	2,55
Advanced Counting and Calculating	91	2,71
Advanced using the Computer at Work	91	3,08
Gültige Number (listenweise)	91	

Not surprisingly, being able to communicate with customers in one´s own language is regarded as the most elementary competence. Next, good manners and positive attitude is highly appreciated.

Closely connected to this „good attitude" is the willingness "to learn more" and the ability to cope with new and unexpected situations. The comptence "to act entrepreneurial", indicated by the willingness to act "if it was the employees own business" reads like a summary of the prior competences.

Clearly there is a logic behind these competences coming first, as all of the more specific skills are ranked behind them.

This sequence suggests that the more specific skills are seen as a consequence of the existence or nonexistence of these key features of habitus and and attitude.

Interstingly enough, intercultural competence sits right between these competences, which reflects the growing significance of an intercultural environment. Coping with this interculturalism is rate das a top priority by the hotel and restaurant managers and owners.

3.3.11.3 Perception of pressing Problems and Opportunities

TourismSME owners and managers were asked for their perceiption of their most pressing problems vs their most apparent opportunities.

CT Most pressing problem 1*Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
Most pressing problem 1	Staff problems (unspecified)	Number	1	0	2	0	3
		% in Country	6,7%	0,0%	10,5%	0,0%	3,7%
	Qualification problems	Number	0	4	0	8	12
		% in Country	0,0%	14,3%	0,0%	42,1%	14,8%
	Quality problems	Number	0	2	1	0	3
		% in Country	0,0%	7,1%	5,3%	0,0%	3,7%
	Infrastructure & Buildings	Number	1	1	3	6	11
		% in Country	6,7%	3,6%	15,8%	31,6%	13,6%
	Taxes and state policy	Number	3	3	4	0	10
		% in Country	20,0%	10,7%	21,1%	0,0%	12,3%
	Recruitment problems	Number	0	3	2	0	5
		% in Country	0,0%	10,7%	10,5%	0,0%	6,2%
	General market situation	Number	6	15	2	0	23
		% in Country	40,0%	53,6%	10,5%	0,0%	28,4%
	Cash flow	Number	0	0	1	0	1
		% in Country	0,0%	0,0%	5,3%	0,0%	1,2%
	Motivation/fluctuation of staff	Number	3	0	1	0	4
		% in Country	20,0%	0,0%	5,3%	0,0%	4,9%

			1	0	3	5	9
Other		Number	1	0	3	5	9
		% in Country	6,7%	0,0%	15,8%	26,3%	11,1%
Overall		Number	15	28	19	19	81
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

While the general market situation is regarded as the most pressing problem, next to infrastructure an dbuildings related problems, staff related problems as Motivation and fluctuation, qualification problems, recruitment problems and quality problems are also frequently mentioned as priority problems.

CT Opportunities1*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Opportunities 1	location/infrastructure	Number	5	5	4	5	19
		% in Country	31,3%	22,7%	23,5%	26,3%	25,7%
	quality of services and products	Number	3	2	1	5	11
		% in Country	18,8%	9,1%	5,9%	26,3%	14,9%
	reputation	Number	1	1	1	9	12
		% in Country	6,3%	4,5%	5,9%	47,4%	16,2%
	quality of staff	Number	0	2	0	0	2
		% in Country	0,0%	9,1%	0,0%	0,0%	2,7%
	positive public policy	Number	0	3	1	0	4
		% in Country	0,0%	13,6%	5,9%	0,0%	5,4%
	innovatve concepts	Number	0	3	1	0	4
		% in Country	0,0%	13,6%	5,9%	0,0%	5,4%
		Number	1	0	1	0	2

competitive pricing/productivity	% in Country	6,3%	0,0%	5,9%	0,0%	2,7%
customer relations	Number	0	1	2	0	3
	% in Country	0,0%	4,5%	11,8%	0,0%	4,1%
general market development	Number	6	3	3	0	12
	% in Country	37,5%	13,6%	17,6%	0,0%	16,2%
other	Number	0	1	3	0	4
	% in Country	0,0%	4,5%	17,6%	0,0%	5,4%
55,00	Number	0	1	0	0	1
	% in Country	0,0%	4,5%	0,0%	0,0%	1,4%
Overall	Number	16	22	17	19	74
	% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

The results for "problems" are mirrored by the perceived opportunities. Also here "objective" factors like the general market development and infrastructure are mentioned.

Factors that can be influenced by the owners and mangers are ranked behind these contextual factors. Quality is the most important among these, while innovative concepts and quality of staf, or even competitive pricing are not very frequently mentioned. Many of these factors may be implicitely included in the opportunity "reputation", which is mentioned by over 16%.

Nevertheless there seems to be a tendency on the side of the managers and owners to look more on things that cannot be influenced by one´s own actions, rather than those who can.

If this can be verified, consulting managers should look into this mindset and question its constructive value, as mangers as role models have a high level of influence on their employees from which they expect a pro-active and constructive attitude.

3.3.11.4 Other Comments

Respondents were invited to add additional comments. These are documented in the chapter to follow.

Croatia

Portugal

"I would like to have training in our area , more support to actions carried out by companies."

"We work with the same team for several years. The Hotel works in family-based system."

"Difficulty in complying with the procedures. Problems in the passages of the work shifts."

"We must invest in small units, family run and with high quality standards. This is not a cheap destination, it will never be directed to mass tourism. Our tourism product is special and unique."

Romania

"would need created an active community of hotels and restaurants"

"Our business is dependent on the summer season - 80%, winter - 20%"

"I think brasov airport is a very important project, which helps us in tourism. I want this project to be surtinut Local Council and by the author."

"Rosenau attendance Association"

Turkey

"in the university (for tourism faculty or school) education of foreign language is not enough anf it is lack for sector."

" the university and accedemic staffs dont conduct the students enough , tourism faculties are far away from real sector. "

"theoretical educations should be given up. most of the staffs in tourism sector arent qualifed (graduated fron university), they re coming from core of this job"

"there is no clearly diffireance between graduated from universty staffs and not ones. university graduated young should have much more practical skills. in this sector it is not important to having a certificate or being graduated from university(tourism)"

"Practical education is much more important. Most of the owner of hotels aren't familiar with tourism, they buy a building and restore in and start to run a hotel, this is a wrong mentality, this bruise tourism in Turkey, diminish the pleasure of customers"

"Most of the students in tourism faculty don't prefer this job willingly this is the problem of exam system. They choose the field of study according the score results of university exams."

"Educated staffs mostly want to work in touristic places. They don't like the positions, they want to work in top positions, they don't have practical skills, and business turnover is problem"

"the university graduated people dont want to work in hotels because of expectation of much more salary."

"salary is not enough in this sector, it is hard to find a staffs having both experienced and educated. low salary but much more workin hours. in school 60 days probation duration is not enough and the students are employed in positions not interested in his her education"

"educated people aren't interested in real sector, they don't have practical skills, they are not good at practical works. but the theoretical education should turn in to practical"

"probetion is unnecesary , educated staff dont work in every position. tourism education should be integrated with sector. rivalry market should be controlled by govermnet"

"last ten years, there have been many progressed in Turkey, insured staff number is getting inrease, laws are known by empoleyees well, righs of employee are getting advanced"

"number of qualified staff is getting decrease. every one tell i am a water. restaurants dont give enough valuable to qualifed staffs. there is lack of representetiveness of employees. there must be implemeted some law amends."

"the most important problem for us is that employees of tourism work in this sector temporary they dont thin this job permenantly"

"there is general lack of pactice of graduated student"

"every time staffs should love the he she work. they should have comminication skills and every time have good contact with customers. every staffs should have good contact wtilt collegues"

For the purposes of product development the emphasis on practical training and right attitude, made by comments from Turkey stand out. Obviously in-company training must compensate deficiencies of the public education system, which in the perception of the practitioners, rather induces status consciousness than practically valid skills.

Also the emphasis of the identification with the profession, the love for the work content, is highly relevant.

3.3.12 Comments and Reflections by Partners (Country Reports)

Partners were invited to comment on the rsults of the SME survey from their own perspective. At the time of this report not all of these reports were available. Those at hand are documented below.

Croatia

The partner Supera[20] submitted 20 questionnaires.

Turkey

The GAZI University Ankara submitted 19 questionnaires subdivided as follows:

- 7 hotels

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[20] Supera poslovno upravljanje d.o.o., Zagreb

- 12 restaurants and bars

Main findings:

The researcher team noticed the following:

- It made inferences that especially managers and employers in tourism sector aren't pleased to the education system in universities and high schools in the field of tourism studies. They think that there is an imaginary curriculum in schools and that curriculum is far away from real sector. It doesn't reflect us. In the schools, the students aren't educated according to our needing. There are too theoretical lessons in schools so the students can't have the abilities for sector; for example students know well how to service theoretically but as for applying they don't know how to do, they think and they're slow because firstly they think and then start to do but we need a staffs having practical abilities.
- Another point they stressed is that students don't want to work us because of low salary or the positions we propose them don't attract them. They don't want to work with the other staffs that don't have certificate or bachelor's degree in the same position. They think themselves different from them but we need service staffs much more. If you want to be a manager, you came from core of job, namely firstly you must work in the lowest position and then gradually rise to manager position, if you don't work in low position then you can't manage that department, you can't understand the lack or necessities or you can't control the employee under you Because the Management positions are limited and we can employ just someone who has experiences. Because of those reasons; they finish their carrier in tourism without starting and start to find new job areas. Especially they want to be employed in governmental institutions.
- Some of them describe that there have been recently opened many new restaurants and hotels. All of them need qualified staffs but there are no enough qualified staffs, so we have to employ unqualified staffs to meet the needing of us. But of course in the long run, it gives us negative feedback; especially costumers' pleasures are getting decrease. Great problem created by this situation is that the importance of qualified staffs is getting condoned because every employer needs to find abruptly new staffs to run their restaurants and hotels. So they hire the employees without taking accountant of whether they're qualified or not. So the qualified staffs are disappeared in these unqualified groups.

- There is a problem in terms of the managers and employers so that there are so much alternative places for employees is that when they don't like something in hotel or restaurants then they resigned and go to another restaurant to work. We are hard to find permanent worker. As soon as we teach our rules and specialties of job them who had no practical skills before, they go to another restaurants to work for much more salaries. This stations make us lose times and money as well.

- Other information attracting our attention is that some hotel managers think that most of the hotel owners is Turkey aren't familiar with tourism sector before. Most of them are contractors and they firstly buy a building and then restore it, change it into a hotel. But it is not so basic to own a hotel, firstly you need the feasibility and substructure and superstructure then you should decide to build a hotel. We think that this comments especially for city hotels in Ankara because Turkey has many beautiful and quality hotels especially in tourism regions.

- We understood that most of the hotels and restaurants give daily, weekly and monthly meeting and briefing but of course the ingredients of these meetings are different from each other. For example the daily meeting can include the things to do in that day or evaluate the yesterday. In hotel the meetings change according to departments. Meeting can include hygiene, safety, first aid, diction, appearances and preventability. And they told us that for example we want the skills of computer or calculating from the staffs in reception but we don't look at these skills for a housekeeper so these criterions are depends. For example foreign language is important for waiter but it is not important for us in kitchen staffs. All the criterions are depends on the departments specialties

Portugal
Viana do Castello

The AEVC[21] - Business Association of Viana do Castelo submitted 20 questionnaires given to the tourism sector companies subdivided as follows:
- 8 hotels
- 12 restaurants

During the process we note some difficulties in filling by the entrepreneurs, particularly in the field of description of employees not being noticeable for all the need to characterize the human resources by gender. The same happens relatively the educational background.

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[21] Associação Empresarial Viana do Castelo

We seek the sample covering companies around the Alto Minho, however there were also answers from companies located outside the county of Viana do Castelo (only 4 / 20%).

Main findings:

- Entrepreneurs with low qualifications
- Low skilled workers
- On the characteristics of workers considered most important for entrepreneurs we highlight the behavioral / social in detriment of the technical characteristics . Continues to prevail the idea that sector favours the training given in the workplace especially in restaurants.
- There is the concern of business owners / managers to ensure of their time to training employees
- Hospitality in comparison with the Restoration there is a greater need for workers with technical skills. There is a greater demand for resources trained in the schools sector
- The sample companies are mostly classified in Tourism portals with good ratings by customers which shows their quality
- Most of the customers are local / national, with few foreign clients. These are mostly English , Spanish and French
- Most companies finds it hard to hire people according to the profile considered necessary / desirable
- As for the importance of skills identified in the questionnaire almost all consider important or very important, the skills in communicatio , especially verbal communication (mother tongue / foreign languag). In terms of accounting and calculation consider it important or very important basic skills and not so much advanced. The same applies to the use of computer.
- The learning to learn, social and civic skills, sense of initiative and cultural awareness it is considered by virtually all as very important or important.
- The problems that concern businessmen are related to the current financial economic situation of the country. Being mostly domestic customers they noticed a decrease in demand.
- Another aspect that worries the sector is the seasonality of the business and the lack of promotion of events in the city able to attract more tourists.
    - Entrepreneurs with business in the historic center of Viana do Castelo also point out the lack of free car parking as a problem.

- As for the best opportunities we highlight the confidence that with the expectation of economic growth may be possible the reduction in taxes affecting the sector, namely the restoration.
    o The focus of Viana do Castelo in promoting the city as a destination of excellence is also seen as an opportunity. The quality exists but needs to be made known especially to foreigners.

Azores Region

The FEPPV[22] - Business submitted 12 questionnaires given to the tourism sector companies subdivided as follows:

- 8 hotels
- 12 restaurants

Main findings:

missing

Romania

During February - March 2015, FPIMM[23] Brasov carried out the research related the situation of Romanian tourism, the regional one in particular, by means of questionnaires. The period in which the research took place is not a busy period for tourism activity.

Main findings

We conducted a database with over 95 accommodations / restaurants around Brasov

We sent and resent the questionnaire by email to all the accommodations / restaurants included in database

We talked on the phone with representatives of all these units to convince them to answer the questionnaire

Consultants went to 10 hotel units to complete questionnaires directly

We sent the questionnaire to potential specialists who will participate in the project as "consultants" in order to fill them with data units that are considering to become direct beneficiaries of the project

We contacted the Tourism Association of Rasnov "Rosenau", in order to disseminate information about the project and to complete questionnaires (association has approx. 40 members)

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[22] Fundação de Ensino Profissional da Praia da Vitória

[23] The Foundation for promoting small and medium-sized enterprises

We emphasized that the units that complete the questionnaire will be included in the project's beneficiaries list

We concluded that nearly 150 tourism enterprises received the project's questionnaire. However the response rate was very low: 20 questionnaires were completed by the end of April 2015.

The discrepancy between efforts and results, in conjunction with work experience gained by consultants, is, according to the Romanian promoter due to several factors:

- Managers are not accustomed to respond to requests from organizations that do not belong strictly to tourism associations
- Managers did not understand well enough the advantages of the project
- Managers of accommodations and restaurants are overloaded (shows low interest in training activities) because of a sense of complacency or that managers have received many offers of free training from the projects financed through European Social Fond Human Resources Development
- The research tool is very complex, requiring more time for completion by the subjects (especially questions about the number and qualifications)

3.3.13 List of Respondents to the SME Survey

TouriSME Comp Respondents		
COUNTRY	ADDRESS	WEBSITE
CROATIA 20		
Agava	Tkalčićeva 39	agavarestaurant.com
Pri Zvoncu	XII Vrbik 1	prizvoncu.com
Didov san	Mletačka 11	konoba-didovsan.com
Restoran Sofra	radnička 50	sofra.hr
Hotel Podravina	Hrvatske državnosti 9	hotel-podravina.hr
Hotel Globo	lovretska 18	hotelglobo.com
Zrno Bistro	Meduličeva 20	zrnobistro.hr
Hotel Rebro	Kispatička 12	hotelrebro.com
Hotel Delminivm	Prosenička 14	hoteldelminivm.fr
Restoran Kuglana	Gajnice 36	pizeria-kuglana.hr
Jazz.ba Chevap	Varšavska 8, 10000 Zagreb	jazzbachevap.com
Mali Raj	Samoborska Cesta 77	maliraj.hr
Capuciner	Kaptol 6 Zagreb	capuciner.hr
Pod Gričkim topom	Zakmardijeve stube 5	restoran-pod-grickim-topom.hr
Maharadja	Opatovina 19,Zagreb	
RougeMarin	Frana Folnegovića 10	rougemarin.hr/
HOTEL ZAGREB	Tomljenovića Gavrana 5	hotelzagreb.com
Hotel Puntijar	gračanska 67	hotelpuntijar.com
Restoran Kvatrić	maksimirska 9	restorankvatric.hr
		tabanzagreb.com
Taban hostel	Tkalčićeva 82	

Erasmus+

COUNTRY	ADDRESS	WEBSITE
PORTUGAL AZORES 12		
Hotel Ango	Alto das Covas, 29-31	http://hotelango.blogspot.pt/
Terceira Mar Hotel	Portões de S. Pedro, 1	www.bensaude.pt
Agência de Viagens Teles	Av. Álvaro Martins Homem, 15-21	www.telestravel.com
Hotel Meira	Rua 5 de Outubro, 56 - Vila Praia de Ancora	www.hotelmeira.com
Pousada de Angra - Castelo de São Sebastião	Rua do Castelinho, s/n - 9700-045 Angra do Heroísmo	www.pousadas.pt
Hotel Teresinha	Praceta Dr. Machado Pires, 45 - Praia da Vitória	www.hotelteresinha.net
R3 Restaurante - Gourmet, marisqueira e saladas	Boavista, 40 - 9760-557 Praia da Vitória	www.r3-restaurante.com
Angra2000, viagens e turismo lda.	Rua Carreira dos Cavalos, 26A . 9700-167 Angra do Heroísmo	www.angra2000.com
Quinta dos Açores	Pico Redondo, 149 - 9700-211 Angra do Heroísmo	www.quintadosacores.com
Restaurante Tradicional da Quinta do Martelo	Canada do Martelo - Cantinho, São Mateus - 9700-576 Angra do Heroísmo	www.quintadomartelo.com
Restaurante Caneta	Às Presas 13, Altares - Ilha Terceira - Açores	http://www.restaurantecaneta.com/
Hotel Praia Marina	Av. Álvaro Martins Homem	www.hotelpraiamarina.com

COUNTRY	ADDRESS	WEBSITE
PORTUGAL VIANNA DO CASTELO 20		
Hotel Flôr de Sal	Av. de Cabo Verde n.º 100, Viana do Castelo	http://www.hotelflordesal.com/
Hotel Rali Viana	Av. Afonso III, 180, 4900-477 Viana do Castelo	www.hotelraliviana.com
Pousada Monte de Santa Luzia	Monte de Santa Luzia, 4901-909 Viana do Castelo	www.pousadas.pt
Sr. Bife Restaurante	Rua Frei Bartolomeu dos Mártires, N.º 90 - Viana do Castelo	www.srbife.com
Restaurant "COVAS"	Rua Prior do Crato N.º 41 - Viana do Castelo | Portugal	N/A
Restaurant Coral	Praça de Timor, Parque Empresarial Praia Norte, Edifício Coral	www.restaurantecoral.com
Restaurante Rocha Camelo,	Rua de Santa Marta - 119, Viana do Castelo | Portugal	www.camelorestaurantes.com
Quinta do Fincão	Travessa da Giesteira, 111 - Viana do Castelo | Portugal	www.quintadofincao.com
Ponte Neiva Restaurant	Av. São Romão N.º10, Neiva - Viana do Castelo | Portugal	www.restaurantepontneiva.com
Paralelo Sensação, Lda	Rua da Presa, 110	www.quintadapreza.pt/
Hotel Minho	EN-13 Vila Meã	www.hotelminho.com
Hotel Porta do Sol Conference Center & SPA	Av. Dr. Dantas Carneiro Lote 1;4910 - 104 Caminha	www.hotelportadosol.com
Restaurante Bar Montanha	Monte de Santa Luzia, 4900 - 408 Viana do Castelo	

Casa Manuel Espregueira e Oliveira	Rua Manuel Espregueira, n.º 190, 4900-318 Viana do Castelo	http://www.casamanuelespregueiraeoliveira.com
Hotel Axis Ponte de Lima	Quinta de Pias, Fornelos - 4990-620 Ponte de Lima	www.axishoteis.com
Restaurante Viana Mar	Avenida dos Combatentes da Grande Guerra 201, 4900 Viana	N/A
Restaurante Os Castrejos	Rua Grande N.º 73, 4900-542 Viana do Castelo	N/A
Restaurante Universo	Rua João Tomás da Costa, N.º 75-77, 4900-509 Viana	N/A
Restaurante Universo	Rua João Tomás da Costa N.º 75-77, 4900-509 Viana do	N/A
Pizaria	Pizzaria Beira Rio	N/A

COUNTRY	ADDRESS	WEBSITE
ROMANIA 20		
Albert Guest House	38 Republicii Streat	www.bistroalbert.ro
Redis Pension	!zvor no 61 Street, City Rasnov, Brasov	www.pensiunearedis.ro
Pensiunea Rem's	Cetatii no 13, street, Rasnov City, Brasov	www.pensiunearemsrasnov.ro
Pensiunea Mama Cozonacilor	Iancu Gontea, Nr. 212, Street, Bran - Simon, Brasov	http://www.mamacozonacilor.ro

Pensiunea Rasnov	Dn 73A, Km 15 + 680	www.pensiunearasnov.ro
Coroana Hotel	62, Republicii Streat, Brasov City	
Acasa La Dracula	22 PoianaLui Strechil Streat, Poiana Crasov	www.house-of-dracula.com
Pantex Hotel	40 Dobrogranu Gherea Streat	WWW.HOTELPANTEX.RO
Cubix Hotel	47 Saturn Streat	www.hotelcubix.ro
Bistro De L'Arte	11 Piata Enescu Streat, Brasov	www.bistrodelarte.ro
DaVinci Restaurant,	4 Apollonia Hirscher, Brasov	www.pensiuneadavinci.ro
Piemonte Hotel	149, Mihail Saulescu Streat, Predeal City	
Rozmarin Hotel	Mihail Saulerscu Streat, Predeal City	
Toscana Guest House	40 Stejarisului Streat, Brasov City	www.pensiuneatoscana.ro
Aro Palace SA	12 Muresenilor Streat, Brasov City	
Star Brunch & More	62 Nicolae Balcescu Streat, Brasov City	
Vinga House	Valea Lunga Streeat, Poiana Brasov City	www.casavinga.ro
Kolping Hotel	27 Sandor Petofi Streat, Brasov City	www.hotel.kolping.ro
Cabana Vanatorilor	3 Brazi Streeat, Predeal City, Brasov	www.cabanavanatorilor.ro
Warthe Guesthouse		
	45 Cibinului Str, Brasov City	www.warthe.ro

COUNTRY	ADDRESS	WEBSITE
TURKEY 19		
Günaydın Restaurant	Eskişehir Yolu No:6, Söğütözü/Ankara; in Armada Mall	www.gunaydinet.com
Jolly Tour	Mevlana Blv (Konya Yolu) No:190, 06520 Ankara; in taurus mall	www.jollytur.com
Downtown	Eskişehir Yolu No:6, Söğütözü/Ankara (0312) 219 1317	www.downtownfoodclub.
Gürhan otel	ÇANKIRI CADDESİ NO: 23 ULUS/ANKARA	none
Aktif Metropolitan Hotel	Oğuzlar Mah. 1377.Sk. No:28 06520 Konya Yolu Üzeri Balgat Ankara - Turkey	http://ankara.metropolitanhotels.com.tr/otel
Capital Plaza Hotel	Konya Yolu No:84 Balgat-Ankara/TURKEY	http://www.capitalplazaankara.com/
Berlitz Hotel	Hükümet Cad. No:4/B Ulus/ANKARA	http://www.berlitzhotel.com/
Verda Hotel	Doganbey Mah., Esdost Sok. No:6, 06030 Ankara, Turkiye	www.verdahotel.ne
Cafe des cafes	Konya Yolu, Mevlana Bulvarı No:190 B Balgat, Çankaya, Ankara in TAURUS Malls	None
Hotel Atalay	Çankırı Cad. No 20, Ankara 06030, Turkey	http://www.atalayhotelankara.com/
Turist Hotel	Çankırı Caddesi No: 37 Ulus / ANKARA, Turkey	http://www.turisthotel.com.tr/
Zeynel Çilli	Konya Yolu, Mevlana Bulvarı No:190 B Balgat, Çankaya, A	http://www.zeynelcilli.com/

Sur Balık Restaurant	Mevlana Bulvarı (Konya Yolu), Fen Lisesi Kavşağı, No: 196/1	http://www.surbalik.com/
Pepper Jam	Konya Yolu No:190/B Taurus AVM Kat:2 No:223/ Ankara	http://pepperjam.com.tr/
Kitchenette	Eskişehir Yolu No:6, Söğütözü/Ankara in Armada Mall	http://www.kitchenette.com.tr/
Almer Hotel	Çankırı Caddesi No:17 06030 Ulus, ANKARA / TURKEY	http://almer.com.tr/
Cotto Restaurant	Mevlana Blv (Konya Yolu) No:190, 06520 AnkaraMevlana Blv (Konya Yolu) No:190, 06520 Ankara in taurus mall	
Mado	Mevlana Blv (Konya Yolu) No:190, 06520 Ankara	www.mado.om.tr
Mickey's by las Chicas	Eskişehir Yolu No:6, Söğütözü/Ankara in Armada Mall	mickeys.com.tr/

4.NATIONAL AND INTERNATIONAL LITERATURE AND WEB RESSOURCES ACCORDING TO NATIONAL REPORTS

Croatia

NATIONAL BUSINESS INCUBATION ASSOCIATION Avalilable at: http://www.nbia.org/resource_library/faq/index.php#1

NATIONAL COORDINATION of EDUCATION for ENTREPRENEURSHIP
 Available at: http://www.e4e.com.hr/?lng=en

CROATION GOVERNMENT (2010) Strategy for Entrepreneurial Learning
 Available at: http://www.seecel.hr/UserDocsImages/STRATEGIJA%20VLADA.pdf

R.Fabac,I.Zver (2011) Tourism and hospitality management.

R.Tomljenović,S.Boranić-Živoder,Z.Marušić (2013) Stakeholder support for tourism development.

dr.sc. A.Bistričić. (2011) The importance of small and medium sized enterprises in the Croatian economy and in the European Union states economies.

Agency for investments and compettitiveness Croatia (2014.Croatia-an investor's guide to tourism". Croatian chamber of economy. (2012.)

The analysis of the educational needs in small and medium enterprises and craft with particular emphasis on entrepreneurial skills."

Adria partners (2010). Calypso study on social tourism-croatia.

Portugal

Banco de Portugal: Analysis of Tourism Sector - http://www.bportugal.pt/pt

Turismo de Portugal, i.p.: Horizon 2015/2020 - http://www.turismodeportugal.pt/

Ministério da Solidariedade, Emprego e Segurança Social: Survey to Continuing Vocational Training - http://www.gep.msess.gov.pt/

Fundação Francisco Manuel dos Santos: Data and statistics - http://www.pordata.pt/Home

Agência Nacional ERASMUS+, Educação e Formação: http://www.proalv.pt/erasmusmais/

Confederação do Turismo Português: Better Skills. Better Tourism! - http://www.confederacaoturismoportugues.pt/

Câmara de Comércio de Angra do Heroísmo: Training - http://www.ccah.eu/

Laboratório Nacional de Engenharia Civil: Facility Services in Hospitality | http://www.lnec.pt

Instituto Nacional de Estatística: The foreign population in Portugal | http://www.ine.pt

Espirito Santo Research: Tourism - Characterization and Business Opportunities

Sónia Cláudia de Carvalho Sampaio, Universidade do Minha: The importance of training of human resources in tourism

International Labour Organization: Developments and challenges in the hospitality and tourism sector

Turismo de Portugal I.P: The financing of tourist activity

Governo de Portugal – Ministério da Economia e do Emprego: National Strategic Plan for Tourism | http://www.portugal.gov.pt

CCDR-N: Action Plan for the North Tourism Development Portugal | www.ccdr-n.pt

AICEP Portugalglobal: TOURISM - Strategic sector for the economy | www.portugalglobal.pt

PWC: The challenges of tourism in Portugal

Confederação do Turismo Português: Study: Best Skills! Best Tourism | www.confederacaoturismoportugues.pt

Associação Industrial Portuguesa: Informal learning and use of ICT in Portuguese sme | www.aip.pt/

World Travel & Tourism Council: Travel & Tourism – Economic Impact 2014 Europe

Romania

Gheorghita Caprarescu- Managementul strategic al firmei de comert si turism- Editura Rosetti 2005

Stefan Sgander- A.B.C.-ul tehnologiei hoteliere si al agroturismului- Editura Diasfera 2005

Gabriela Stanciulescu- Managementul operatiunilor de turism-Editura All BECK-2003

Gabriela Stanciulescu- Tehnica operatiunilor de turism- Editura All BECK- 2005

Gabriela Stanciulescu- Managementul turismului durabil in centrele urbane- Editura Economica 2004

The Romanian National Institute of Statistics www.insse.ro

The Romanian National Authority for Tourism http://turism.gov.ro/

Turkey

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Restaurant and Hotel Managers Views

Academicians and Master Students Views

5. ANNEX: TABLES: RESULTS OF SME SURVEY

Summary of Cases

	Cases					
	Valid		Missing		Overall	
	H	Percent	H	Percent	H	Percent
Writing mother Language * Country	91	100,0%	0	0,0%	91	100,0%
Reading/understanding written instructions mother Language * Country	91	100,0%	0	0,0%	91	100,0%
Communication with customers in mother Language * Country	91	100,0%	0	0,0%	91	100,0%
Writing in a foreign Language * Country	91	100,0%	0	0,0%	91	100,0%
Talking to customers in a foreign Language * Country	91	100,0%	0	0,0%	91	100,0%
Basic Counting and Calculating * Country	91	100,0%	0	0,0%	91	100,0%
Advanced Counting and Calculating * Country	91	100,0%	0	0,0%	91	100,0%
Basic using the Computer at Work * Country	91	100,0%	0	0,0%	91	100,0%

Advanced using the Computer at Work * Country	91	100,0%	0	0,0%	91	100,0%
To have ambition and willingness to learn more * Country	91	100,0%	0	0,0%	91	100,0%
Methods of self-regulated learning * Country	91	100,0%	0	0,0%	91	100,0%
Establish and follow learning objectives * Country	91	100,0%	0	0,0%	91	100,0%
Ability to cope with new and unexpected situations * Country	91	100,0%	0	0,0%	91	100,0%
Good manners, ability to show a positive attitude * Country	91	100,0%	0	0,0%	91	100,0%
General "pro-active" attitude * Country	91	100,0%	0	0,0%	91	100,0%
Acting "entrepreneurial" i.e. treating every customer as if it was the employees own business * Country	91	100,0%	0	0,0%	91	100,0%

Ability to interact with and address the needs of customers from different cultural backgrounds * Country	91	100,0%	0	0,0%	91	100,0%

CT Writing Mother Language*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Writing mother Language	Very significant	Number	16	13	14	7	50
		% in Country	80,0%	40,6%	70,0%	36,8%	54,9%
	Quite significant	Number	4	12	5	2	23
		% in Country	20,0%	37,5%	25,0%	10,5%	25,3%
	Somewhat significant	Number	0	4	1	7	12
		% in Country	0,0%	12,5%	5,0%	36,8%	13,2%
	Not very significant	Number	0	3	0	1	4
		% in Country	0,0%	9,4%	0,0%	5,3%	4,4%
	Not significant	Number	0	0	0	2	2
		% in Country	0,0%	0,0%	0,0%	10,5%	2,2%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Reading/understanding written instructions Mother Language*Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
Reading/understanding written instructions mother Language	Very significant	Number	20	12	14	13	59
		% in Country	100,0%	37,5%	70,0%	68,4%	64,8%
	Quite significant	Number	0	17	4	5	26
		% in Country	0,0%	53,1%	20,0%	26,3%	28,6%
	Somewhat significant	Number	0	2	2	0	4
		% in Country	0,0%	6,3%	10,0%	0,0%	4,4%
	Not significant	Number	0	1	0	1	2
		% in Country	0,0%	3,1%	0,0%	5,3%	2,2%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Communication with customers in Mother Language*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Communication with customers in mother Language	Very significant	Number	20	28	16	18	82
		% in Country	100,0%	87,5%	80,0%	94,7%	90,1%
	Quite significant	Number	0	3	2	1	6
		% in Country	0,0%	9,4%	10,0%	5,3%	6,6%
	Somewhat significant	Number	0	1	2	0	3
		% in Country	0,0%	3,1%	10,0%	0,0%	3,3%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Writing in a foreign Language*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Writing in a foreign Language	Very significant	Number	2	7	6	1	16
		% in Country	10,0%	21,9%	30,0%	5,3%	17,6%
	Quite significant	Number	5	17	9	2	33
		% in Country	25,0%	53,1%	45,0%	10,5%	36,3%
	Somewhat significant	Number	10	6	2	4	22
		% in Country	50,0%	18,8%	10,0%	21,1%	24,2%
	Not very significant	Number	3	2	2	9	16
		% in Country	15,0%	6,3%	10,0%	47,4%	17,6%
	Not significant	Number	0	0	1	3	4
		% in Country	0,0%	0,0%	5,0%	15,8%	4,4%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Talking to customers in a foreign Language*Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
Talking to customers in a foreign Language	Very significant	Number	18	24	14	9	65
		% in Country	90,0%	75,0%	70,0%	47,4%	71,4%
	Quite significant	Number	2	7	3	6	18
		% in Country	10,0%	21,9%	15,0%	31,6%	19,8%
	Somewhat significant	Number	0	1	3	2	6
		% in Country	0,0%	3,1%	15,0%	10,5%	6,6%
	Not significant	Number	0	0	0	2	2
		% in Country	0,0%	0,0%	0,0%	10,5%	2,2%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Basic Counting and Calculating*Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
Basic Counting and Calculating	Very significant	Number	20	15	10	12	57
		% in Country	100,0%	46,9%	50,0%	63,2%	62,6%
	Quite significant	Number	0	13	8	6	27
		% in Country	0,0%	40,6%	40,0%	31,6%	29,7%
	Somewhat significant	Number	0	4	2	0	6
		% in Country	0,0%	12,5%	10,0%	0,0%	6,6%
	Not very significant	Number	0	0	0	1	1
		% in Country	0,0%	0,0%	0,0%	5,3%	1,1%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Advanced Counting and Calculating*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Advanced Counting and Calculating	Very significant	Number	1	5	5	3	14
		% in Country	5,0%	15,6%	25,0%	15,8%	15,4%
	Quite significant	Number	4	10	10	4	28
		% in Country	20,0%	31,3%	50,0%	21,1%	30,8%
	Somewhat significant	Number	10	6	3	6	25
		% in Country	50,0%	18,8%	15,0%	31,6%	27,5%
	Not very significant	Number	5	9	0	4	18
		% in Country	25,0%	28,1%	0,0%	21,1%	19,8%
	Not significant	Number	0	2	2	2	6
		% in Country	0,0%	6,3%	10,0%	10,5%	6,6%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Basic using the Computer at Work*Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
Basic using the Computer at Work	Very significant	Number	20	15	11	5	51
		% in Country	100,0%	46,9%	55,0%	26,3%	56,0%
	Quite significant	Number	0	11	4	10	25
		% in Country	0,0%	34,4%	20,0%	52,6%	27,5%
	Somewhat significant	Number	0	5	1	4	10
		% in Country	0,0%	15,6%	5,0%	21,1%	11,0%
	Not very significant	Number	0	0	1	0	1
		% in Country	0,0%	0,0%	5,0%	0,0%	1,1%
	Not significant	Number	0	1	3	0	4
		% in Country	0,0%	3,1%	15,0%	0,0%	4,4%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Advanced using the Computer at Work*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Advanced using the Computer at Work	Very significant	Number	0	5	2	1	8
		% in Country	0,0%	15,6%	10,0%	5,3%	8,8%
	Quite significant	Number	2	5	10	3	20
		% in Country	10,0%	15,6%	50,0%	15,8%	22,0%
	Somewhat significant	Number	11	10	3	5	29
		% in Country	55,0%	31,3%	15,0%	26,3%	31,9%
	Not very significant	Number	7	9	1	8	25
		% in Country	35,0%	28,1%	5,0%	42,1%	27,5%
	Not significant	Number	0	3	4	2	9
		% in Country	0,0%	9,4%	20,0%	10,5%	9,9%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT To have ambition and willingness to learn more *Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
To have ambition and willingness to learn more	Very significant	Number	20	30	13	14	77
		% in Country	100,0%	93,8%	65,0%	73,7%	84,6%
	Quite significant	Number	0	1	3	4	8
		% in Country	0,0%	3,1%	15,0%	21,1%	8,8%
	Somewhat significant	Number	0	1	3	1	5
		% in Country	0,0%	3,1%	15,0%	5,3%	5,5%
	Not very significant	Number	0	0	1	0	1
		% in Country	0,0%	0,0%	5,0%	0,0%	1,1%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Methods of self-regulated learning*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Methods of self-regulated learning	Very significant	Number	14	23	8	10	55
		% in Country	70,0%	71,9%	40,0%	52,6%	60,4%
	Quite significant	Number	4	7	7	4	22
		% in Country	20,0%	21,9%	35,0%	21,1%	24,2%
	Somewhat significant	Number	2	2	3	1	8
		% in Country	10,0%	6,3%	15,0%	5,3%	8,8%
	Not very significant	Number	0	0	2	4	6
		% in Country	0,0%	0,0%	10,0%	21,1%	6,6%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Establish and follow learning objectives*Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
Establish and follow learning objectives	Very significant	Number	7	22	9	9	47
		% in Country	35,0%	68,8%	45,0%	47,4%	51,6%
	Quite significant	Number	10	7	5	5	27
		% in Country	50,0%	21,9%	25,0%	26,3%	29,7%
	Somewhat significant	Number	3	3	4	1	11
		% in Country	15,0%	9,4%	20,0%	5,3%	12,1%
	Not very significant	Number	0	0	2	4	6
		% in Country	0,0%	0,0%	10,0%	21,1%	6,6%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Ability to cope with new and unexpected situations*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Ability to cope with new and unexpected situations	Very significant	Number	20	25	12	12	69
		% in Country	100,0%	78,1%	60,0%	63,2%	75,8%
	Quite significant	Number	0	6	5	7	18
		% in Country	0,0%	18,8%	25,0%	36,8%	19,8%
	Somewhat significant	Number	0	1	2	0	3
		% in Country	0,0%	3,1%	10,0%	0,0%	3,3%
	Not very significant	Number	0	0	1	0	1
		% in Country	0,0%	0,0%	5,0%	0,0%	1,1%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Good manners, ability to show a positive attitude*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Good manners, ability to show a positive attitude	Very significant	Number	20	28	15	14	77
		% in Country	100,0%	87,5%	75,0%	73,7%	84,6%
	Quite significant	Number	0	3	3	4	10
		% in Country	0,0%	9,4%	15,0%	21,1%	11,0%
	Somewhat significant	Number	0	1	2	1	4
		% in Country	0,0%	3,1%	10,0%	5,3%	4,4%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT General "pro-active" attitude*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
General "pro-active" attitude	Very significant	Number	20	24	8	10	62
		% in Country	100,0%	75,0%	40,0%	52,6%	68,1%
	Quite significant	Number	0	7	8	7	22
		% in Country	0,0%	21,9%	40,0%	36,8%	24,2%
	Somewhat significant	Number	0	1	2	2	5
		% in Country	0,0%	3,1%	10,0%	10,5%	5,5%
	Not very significant	Number	0	0	1	0	1
		% in Country	0,0%	0,0%	5,0%	0,0%	1,1%
	Not significant	Number	0	0	1	0	1
		% in Country	0,0%	0,0%	5,0%	0,0%	1,1%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Acting "entrepreneurial" i.e. treating every customer as if it was the employees own business*Country

			Country				
			Croatia	Portugal	Romania	Turkey	Overall
Acting "entrepreneurial" i.e. treating every customer as if it was the employees own business	Very significant	Number	20	26	8	14	68
		% in Country	100,0%	81,3%	40,0%	73,7%	74,7%
	Quite significant	Number	0	5	10	3	18
		% in Country	0,0%	15,6%	50,0%	15,8%	19,8%
	Somewhat significant	Number	0	1	1	1	3
		% in Country	0,0%	3,1%	5,0%	5,3%	3,3%
	Not very significant	Number	0	0	0	1	1
		% in Country	0,0%	0,0%	0,0%	5,3%	1,1%
	Not significant	Number	0	0	1	0	1
		% in Country	0,0%	0,0%	5,0%	0,0%	1,1%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

CT Ability to interact with and address the needs of customers from different cultural backgrounds*Country

			Country				Overall
			Croatia	Portugal	Romania	Turkey	
Ability to interact with and address the needs of customers from different cultural backgrounds	Very significant	Number	18	23	10	15	66
		% in Country	90,0%	71,9%	50,0%	78,9%	72,5%
	Quite significant	Number	2	8	8	3	21
		% in Country	10,0%	25,0%	40,0%	15,8%	23,1%
	Somewhat significant	Number	0	1	2	1	4
		% in Country	0,0%	3,1%	10,0%	5,3%	4,4%
Overall		Number	20	32	20	19	91
		% in Country	100,0%	100,0%	100,0%	100,0%	100,0%

Descriptive Statistics

	N	Average
Writing mother Language	91	1,74
Reading/understanding written instructions mother Language	91	1,46
Communication with customers in mother Language	91	1,13
Writing in a foreign Language	91	2,55
Talking to customers in a foreign Language	91	1,42
Basic Counting and Calculating	91	1,46
Advanced Counting and Calculating	91	2,71
Basic using the Computer at Work	91	1,70
Advanced using the Computer at Work	91	3,08
To have ambition and willingness to learn more	91	1,23
Methods of self-regulated learning	91	1,62
Establish and follow learning objectives	91	1,74
Ability to cope with new and unexpected situations	91	1,30
Good manners, ability to show a positive attitude	91	1,20
General "pro-active" attitude	91	1,43
Acting "entrepreneurial" i.e. treating every customer as if it was the employees own business	91	1,34
Ability to interact with and address the needs of customers from different cultural backgrounds	91	1,32
Gültige Number (listenweise)	91	

Descriptive Statistics[a]

	N	Average
Writing mother Language	20	1,20
Reading/understanding written instructions mother Language	20	1,00
Communication with customers in mother Language	20	1,00
Writing in a foreign Language	20	2,70
Talking to customers in a foreign Language	20	1,10
Basic Counting and Calculating	20	1,00
Advanced Counting and Calculating	20	2,95
Basic using the Computer at Work	20	1,00
Advanced using the Computer at Work	20	3,25
To have ambition and willingness to learn more	20	1,00
Methods of self-regulated learning	20	1,40
Establish and follow learning objectives	20	1,80
Ability to cope with new and unexpected situations	20	1,00
Good manners, ability to show a positive attitude	20	1,00
General "pro-active" attitude	20	1,00
Acting "entrepreneurial" i.e. treating every customer as if it was the employees own business	20	1,00
Ability to interact with and address the needs of customers from different cultural backgrounds	20	1,10
Gültige Number (listenweise)	20	

a. Country = Croatia

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Descriptive Statistics[a]

	N	Avrage
Writing mother Language	32	1,91
Reading/understanding written instructions mother Language	32	1,78
Communication with customers in mother Language	32	1,16
Writing in a foreign Language	32	2,09
Talking to customers in a foreign Language	32	1,28
Basic Counting and Calculating	32	1,66
Advanced Counting and Calculating	32	2,78
Basic using the Computer at Work	32	1,78
Advanced using the Computer at Work	32	3,00
To have ambition and willingness to learn more	32	1,09
Methods of self-regulated learning	32	1,34
Establish and follow learning objectives	32	1,41
Ability to cope with new and unexpected situations	32	1,25
Good manners, ability to show a positive attitude	32	1,16
General "pro-active" attitude	32	1,28
Acting "entrepreneurial" i.e. treating every customer as if it was the employees own business	32	1,22
Ability to interact with and address the needs of customers from different cultural backgrounds	32	1,31
Gültige Number (listenweise)	32	

a. Country = Portugal

Descriptive Statistics[a]

	N	Average
Writing mother Language	20	1,35
Reading/understanding written instructions mother Language	20	1,40
Communication with customers in mother Language	20	1,30
Writing in a foreign Language	20	2,15
Talking to customers in a foreign Language	20	1,45
Basic Counting and Calculating	20	1,60
Advanced Counting and Calculating	20	2,20
Basic using the Computer at Work	20	2,05
Advanced using the Computer at Work	20	2,75
To have ambition and willingness to learn more	20	1,60
Methods of self-regulated learning	20	1,95
Establish and follow learning objectives	20	1,95
Ability to cope with new and unexpected situations	20	1,60
Good manners, ability to show a positive attitude	20	1,35
General "pro-active" attitude	20	1,95
Acting "entrepreneurial" i.e. treating every customer as if it was the employees own business	20	1,80
Ability to interact with and address the needs of customers from different cultural backgrounds	20	1,60
Gültige Number (listenweise)	20	

a. Country = Romania

Descriptive Statistics[a]

	N	Average
Writing mother Language	19	2,42
Reading/understanding written instructions mother Language	19	1,47
Communication with customers in mother Language	19	1,05
Writing in a foreign Language	19	3,58
Talking to customers in a foreign Language	19	1,95
Basic Counting and Calculating	19	1,47
Advanced Counting and Calculating	19	2,89
Basic using the Computer at Work	19	1,95
Advanced using the Computer at Work	19	3,37
To have ambition and willingness to learn more	19	1,32
Methods of self-regulated learning	19	1,95
Establish and follow learning objectives	19	2,00
Ability to cope with new and unexpected situations	19	1,37
Good manners, ability to show a positive attitude	19	1,32
General "pro-active" attitude	19	1,58
Acting "entrepreneurial" i.e. treating every customer as if it was the employees own business	19	1,42
Ability to interact with and address the needs of customers from different cultural backgrounds	19	1,26
Gültige Number (listenweise)	19	

a. Country = Turkey

[Strengths:] 7.b.: What are the verbal comments you receive on these portals or directly from your customers?ᵃ

		Häufigkeit	Prozent	Gültige Prozent	Kumulative Prozente
Gültig	arrangement	1	5,0	5,0	5,0
	different offer	1	5,0	5,0	10,0
	friendly staff	1	5,0	5,0	15,0
	good food	3	15,0	15,0	30,0
	good food and service	2	10,0	10,0	40,0
	good food and stuff	1	5,0	5,0	45,0
	good food,service .	1	5,0	5,0	50,0
	good portions,good prices	1	5,0	5,0	55,0
	GOOD PRICE	1	5,0	5,0	60,0
	good price-quality ratio	1	5,0	5,0	65,0
	good service	1	5,0	5,0	70,0
	good service and food	1	5,0	5,0	75,0
	Great food and service	1	5,0	5,0	80,0
	healthy food	1	5,0	5,0	85,0
	intresting concept	1	5,0	5,0	90,0
	modern cuisine	1	5,0	5,0	95,0
	Nice staff	1	5,0	5,0	100,0
	Overall	20	100,0	100,0	

a. Country = Croatia

Weaknesses Croatia

[Weaknesses:] 7.b.: What are the verbal comments you receive on these portals or directly from your customers?[a]

		Häufigkeit	Prozent	Gültige Prozent	Kumulative Prozente
Gültig	bit noisy	1	5,0	5,0	5,0
	can be to crowd	1	5,0	5,0	10,0
	high prices	2	10,0	10,0	20,0
	needed restauration	1	5,0	5,0	25,0
	none	2	10,0	10,0	35,0
	OLD FURNITURE	1	5,0	5,0	40,0
	Poor interior	1	5,0	5,0	45,0
	small portions	1	5,0	5,0	50,0
	smoking allowed	1	5,0	5,0	55,0
	sometimes too crowded	1	5,0	5,0	60,0
	unprofessional staff	1	5,0	5,0	65,0
	x	7	35,0	35,0	100,0
	Overall	20	100,0	100,0	

a. Country = Croatia

Strenghts Portugal

[Strengths:] 7.b.: What are the verbal comments you receive on these portals or directly from your customers?[a]

	Häufigkeit	Prozent
Gültig	11	34,4
Architecture, service, location, friendliness	1	3,1
Cleanliness, localization and sympathy	1	3,1
Excellent views of the city, service, team, gastronomy and the architecture of the building	1	3,1
Family environment, near the airport	1	3,1
Food and excellent service	1	3,1
Food, service and decor environment	1	3,1
Free parking and quality of service	1	3,1
Friendliness and professional staff. The comfort and service.	1	3,1
Good home cooked food.	1	3,1
Good quality food and good price / quality ratio	1	3,1
Good quality-price ratio; Wi-fi; friendliness and cleanliness	1	3,1
Landscape, environment and employees	1	3,1
Localization, availability of employees	1	3,1
Location - on the beach	1	3,1
Location and service quality	1	3,1
Location, cleanliness and comfort	1	3,1
Positive evaluation of services	1	3,1
Quality service - Meal quality - Wine List	1	3,1
Service, food and building itself	1	3,1

Staff, cleanliness and prime location	1	3,1
The good quality of meals	1	3,1
Overall	32	100,0

a. Country = Portugal

Weaknesses Portugal

[Weaknesses:] 7.b.: What are the verbal comments you receive on these portals or directly from your customers?[a]

		Häufigkeit	Prozent
Gültig		20	62,5
	Airline tickets prices	1	3,1
	Comfort	1	3,1
	Lack of free parking	1	3,1
	Lack of internet in all rooms	1	3,1
	Lead time - Price	1	3,1
	N/A	1	3,1
	Price	1	3,1
	Service	1	3,1
	Size of the rooms and WC, price	1	3,1
	Sometimes the service is slow	1	3,1
	Value for money	1	3,1
	Waiting time for food and little space	1	3,1
	Overall	32	100,0

a. Country = Portugal

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Strenghts Romania

[Strengths:] 7.b.: What are the verbal comments you receive on these portals or directly from your customers?[a]

	Häufigkeit	Prozent
Gültig	2	10,0
accommodation, catering, cleaning	1	5,0
cleanliness, courtesy, varied breakfast	1	5,0
cleanliness, friendly staff, good muncare	1	5,0
cleanliness, staff courtesy, quality service	1	5,0
friendliness of staff, quality of service	1	5,0
location, cleanliness, tranquility, services	1	5,0
location, condition	1	5,0
Location, kindness, cleanliness	1	5,0
Location, price, staff	1	5,0
location, quality food	1	5,0
locations in Poiana Brasov	1	5,0
personal, location	1	5,0
quality service, in-room interior design, languages, availability	1	5,0
quiet place, a pastry, playground for children, sports ground	1	5,0
restaurant	1	5,0
Short distance to turistic sights	1	5,0
There is not	1	5,0
View, cleanliness, varied breakfast	1	5,0

	Häufigkeit	Prozent
Overall	20	100,0

a. Country = Romania

Weaknesses Romania

[Strengths:] 7.b.: What are the verbal comments you receive on these portals or directly from your customers?[a]

		Häufigkeit	Prozent
Gültig		2	10,0
	accommodation, catering, cleaning	1	5,0
	cleanliness, courtesy, varied breakfast	1	5,0
	cleanliness, friendly staff, good muncare	1	5,0
	cleanliness, staff courtesy, quality service	1	5,0
	friendliness of staff, quality of service	1	5,0
	location, cleanliness, tranquility, services	1	5,0
	location, condition	1	5,0
	Location, kindness, cleanliness	1	5,0
	Location, price, staff	1	5,0
	location, quality food	1	5,0
	locations in Poiana Brasov	1	5,0
	personal, location	1	5,0
	quality service, in-room interior design, languages, availability	1	5,0

quiet place, a pastry, playground for children, sports ground	1	5,0
restaurant	1	5,0
Short distance to turistic sights	1	5,0
There is not	1	5,0
View, cleanliness, varied breakfast	1	5,0
Overall	20	100,0

a. Country = Romania

Weaknesses Romania

[Weaknesses:] 7.b.: What are the verbal comments you receive on these portals or directly from your customers?[a]

		Häufigkeit	Prozent
Gültig		4	20,0
	Do not have sufficient parking spaces	1	5,0
	great distance from downtown	1	5,0
	hard to find, very little parking	1	5,0
	lack of tourism activities	1	5,0
	limited menu, slow service	1	5,0
	no parking places	1	5,0
	service, restaurant orchestra	1	5,0
	settlement road, noise	1	5,0
	small diagonal TVs	1	5,0
	Street noise	1	5,0
	Technical failure	1	5,0
	the location is outdated necessary renovations	1	5,0
	There is not	1	5,0
	too little space	1	5,0
	unfavorable location	1	5,0
	walking distance of vehicles	1	5,0
	Overall	20	100,0

a. Country = Romania

Strenghts Turkey

[Strengths:] 7.b.: What are the verbal comments you receive on these portals or directly from your customers?ª

		Häufigkeit	Prozent
Gültig		2	10,5
	cleanless, accommodation	1	5,3
	cleanless, service, quality	1	5,3
	menu, dessert are good	1	5,3
	presentation, taste, friendship, hospitality	1	5,3
	price, quality balance; smiling face, good service, cleanliness, helpfulness	1	5,3
	price, staffs, service, location	1	5,3
	quality, taste, design, ambiance, concept	1	5,3
	quality, taste, service	1	5,3
	qulilfied staffs, good breakfast, very good rooms	1	5,3
	rooms are good, restaurant, and hospitality	1	5,3
	service qualityi good staffs, smiling face	1	5,3
	service, comminicitation, safety, taste	1	5,3
	taste mostly	1	5,3
	taste, delicious, presentation is good	1	5,3
	taste, presentation	1	5,3
	taste, service, friendship	1	5,3
	taste, service, menu, ambiance	1	5,3
	Overall	19	100,0

Weaknesses Turkey

[Weaknesses:] 7.b.: What are the verbal comments you receive on these portals or directly from your customers?ª

	Häufigkeit	Prozent
Gültig	6	31,6
coldness in open area	1	5,3
crowding, sometimes delays	1	5,3
density	1	5,3
especially baths in room but it depends	1	5,3
location byt it depends some of them like location but some of them not like	1	5,3
location, traffic, far from the city	1	5,3
pirce, sometimes delays	1	5,3
price	1	5,3
some delays	1	5,3
some delays because of crowdedness	1	5,3
some phsical conditions, old building	1	5,3
some time crowdness	1	5,3
sometimes crowdness	1	5,3
Overall	19	100,0

a. Country = Turkey