



Republic of Montenegro
Ministry of Tourism and Environment

Human Resources Development Strategy for the Tourism Sector in Montenegro

Podgorica, may 2007

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List of Abbreviations

BMZ	Federal Ministry for Economic Development and Cooperation
CARDS	Community Assistance for Reconstruction, Development and Stabilization
CEFE	Competency based Economies, Formation of Enterprise
ETF	European Training Foundation
GTZ	German Technical Cooperation (GTZ) GmbH
HR	Human Resources
HRD	Human Resources Development
ILO	International Labor Organization
ITC	Information Technology and Communication
LTO	Local Tourism Organization
NTO	National Tourism Organization
ÖPNV	Public Regional Passenger Traffic
PPP	Public Private Partnership
PRSP	Poverty Reduction Strategy Paper
VET	Vocational Education and Training
WTO	World Tourism Organization
WTTC	World Travel & Tourism Council

FORWORD

As a Service Industry, tourism by its very nature is a labor intensive business that not only requires professional competencies but also significant social skills.

Tourism is, above all, about perception and personal well being of all the participants, both in development and providing as well as in receiving tourism products. Montenegrin Government recognizes that providing well educated, trained, and socially competent workforce is equally important as building accommodation capacities and developing the infrastructure and necessary facilities. Therefore human resources development is an integral part of the Master plan for sustainable tourism development.

According to forecasts by WTTC and Oxford Economic Forecasting, the travel and tourism sector of Montenegro's economy is expected to create conditions for about one thousand new jobs each year for the next ten years, providing in such a way more than 20% of total employment in Montenegro by the year 2016.

In line with this forecast, the Government of the Republic of Montenegro has adopted Human Resources Strategy for tourism sector with the specific aim to bring new professionalism, provide funding and improve coordination of work of all institutions involved in developing human capital necessary to support growth of travel and tourism.

The objective of this Strategy is to bridge the gap between public and private sector by applying best practices, aligning the process of professional education with industry needs, and by promoting careers in the travel and tourism sector as attractive for an increasing number of young people.

Predrag Nenezic

Minister of Tourism and Environment

1 Introduction

Montenegro is aware of its significant economic and social development potentials in the tourism sector. For that reason, a Master Plan for Development of the Tourism Sector was developed in 2001, with German support (Tourism Master Plan for Montenegro). Its basic goal is to develop a higher level of competitiveness of this sector by diversification and essential quality improvement of the tourist industry.

The „Tourism Master Plan”, but also other important strategic papers, like PRSP (Poverty Reduction Strategy Paper), emphasize the significance of adequately qualified specialists for the development of the tourism sector as well as the need for a Human Resources Development Strategy (HRD strategy). This Strategy should take into account the high relevance of availability of qualified and competent human resources for the tourism sector and show how the development of tourism specific qualification services and their integration into the current reform of the education and vocational education system should be organized in the future.

The HRD Strategy development proceeds from the necessity to concentrate systemically on the all levels of the tourism sector and to integrate political and economic decision-makers, representatives of competent institutions as well as managers and specialists from tourist enterprises and qualification service providers – as participants – into the strategy, i.e. strategy development.

Furthermore, the HRD Strategy proceeds from the premise that the high quality of tourism services as required in the “Tourism Master Plan” can be realized by a high quality education and advanced training of specialists at all levels only. This high quality of education and advanced training is achieved by a far-reaching integration of formal and non-formal qualification measures required for tourism into a National Qualification Framework (NQF) as well as by the development of appropriate vocational, i.e. competence standards (if they are not available yet). A reference system for qualifications is used in this way, which corresponds to the EU harmonization efforts: school diplomas can be easier compared with each other, and hence, national qualifications become transparent all over Europe and the mobility between European education systems and on the labor market is growing.

Based on the request of the Ministry of Tourism and Environment of Montenegro for support in the development of the HRD Strategy for Tourism, the Federal Ministry for Economic Development (BMZ) has assigned this job to GTZ (German Technical Cooperation). The present Draft Human Resources Development Strategy was prepared in collaboration with ghh-consult and it was presented to the interdisciplinary working

group for tourism in Podgorica/Montenegro in November 2006, for discussion and harmonization. Methodically, the Strategy is based on inquiries and surveys on the basis of interviews supported by questions formulated in advance, with a selected number of relevant institutions and persons, which were conducted in a period of 1.5 week in the spring of 2006. Already existing studies and empiric data were used as a supplement in cases where essential and priority statements and trends required an additional validation.

2 Executive Summary

- In the medium and long term, the tourist offer in Montenegro will experience both a clear quantitative expansion and a qualitative shift to offers with a higher quality. Moreover, the tourist offer will be continuously diversified in the future, in order to open up new markets and target groups and to provide a prolongation of the season.
- High priority is assigned to the Hotel and Catering areas, but also to the Travel Agency area: out of the current number of ca. 14,500 (full-time) jobs in the tourism sector, barely 83% pertain to the Hotel and Catering sector, ca. 10% to Travel Agencies and ca. 7% to other areas. A growth up to ca. 24,500 (full-time) jobs in tourism is forecasted by 2016. The above mentioned shares of the respective areas will remain more or less the same.
- Taking into account the additional need of 10,000 qualified full-time specialists by 2016, it appears that, on the average 1,000 specialists p.a. will be needed for these priority areas in the forthcoming 10 years. Out of this number, about 55% refer to Level III, 27% to Level IV (medium qualification level) and 17% to Levels V-VII (high qualification level).¹ (Concerning data about part-time jobs and low skilled labor, i.e. temporary/casual workers of Level I + II, including predominantly foreign seasonal workers, it was impossible to make reliable quantitative statements at the time when the HRD Strategy was prepared).
- This has direct consequences on Human Resources (HR) in the tourism sector: it is clear that, on the whole, much more qualified specialists of a higher qualification level are required, who satisfy the diversified tourist offer and the accompanying need of the tourist industry for competent staff.
- Apart from the quantitative bottleneck of the qualification offer, there are also considerable deficits in the qualitative area. Regardless of considerable improvements in the past, most qualification services for the tourism sector still don't comply, in general, with the requirements and the demand of the tourist enterprises and the international standards. This applies to both the formal and the non-formal education offer. The HRD Strategy provides for a higher practice-orientation and also a stronger application of the Dual System provided for by the Law on Vocational Education of Montenegro as its priority sphere of activity.

¹ The designation Level I to Level VIII is used hereinafter for classification of the qualification levels, which refers to the reference levels of the „National Vocational Qualifications in Montenegro“. CARDS-program has made them up as a draft in 2004 and they are not included in a National Qualification Framework (NQF) yet. For the HRD Strategy in Tourism, the „Perspectives Paper: National Vocational Qualifications in Montenegro. VET 2004“ is used as a temporary reference for further implementation, as the NQF is still under development, but it will be made up in the foreseeable future in a similar way. Cf. also Appendix C: „Draft Version of Description of Levels“.

- A further subsequent differentiation and systematization of the HRD Strategy, in particular for the area of non-formal education, is required on the basis of the heterogeneity of the tourism sector and the resulting new, i.e. heavily changing demands on the employees in this sector.
- The current main intervention areas of the HRD Strategy in Tourism and thus a basis for the priority spheres of activity, not only for formal but also for non-formal education, are:
 - Improvement of the institutional, organizational and regulatory parameters;
 - Promotion of the qualification service providers and increase of the education capacities;
 - Development of the qualification offers in compliance with needs and demand;
 - Capacity Development for teaching and management staff.

3 Human Resources Development Strategy in the Tourism Sector: Statement of Reasons

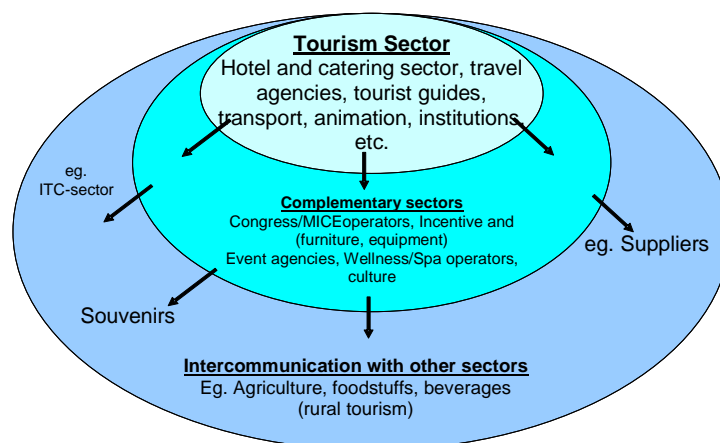
3.1 Specific Features of the Tourism Sector and Demands on Human Resources

Opposite to other economic sectors, the tourism sector is characterized by specific features, which have indirect and direct effects and specific demands on the HRD Strategy:

- It is not the service of one single provider that is sold in tourism, but a package of services of various players. The quality of each individual module of this package is crucial for the total quality perceived by the tourist, i.e. guest. The insufficient quality of one single service can already have a negative effect on the total quality. This leads to special expectations and requirements on each single employee in the tourism sector.
- Tourism is a personnel-intensive sector. A high quality of tourist services highly depends on the availability of sufficient human resources (quantitatively and qualitatively).
- The tourist product is established by numerous different players; there is a close intercommunication with complementary and other economic sectors (Cluster; see graphic below).
- This means that the employees in tourism must have basic knowledge of these sectors in order to get a better understanding of connections and thus to provide the quality of the total product. The high degree of intercommunication with other sectors also opens up big chances and potentials for the economy and employment in Montenegro.
- The tourism sector is characterized by small and medium enterprises (SME). The average number of employees per enterprise in the hotel and restaurant sector amounted, according to Eurostat in 1996 in the then EU member-states, to 4.6 only². This emphasizes the demands on the employees concerning flexibility in engagement possibilities and a broad qualification profile („multi-skilled“)

² Cf. ILO: Human Resources Development, Employment and Globalization in the Hotel, Catering and Tourism Sector. Geneva, 2001.

Tourism Sector and Intercommunication with Complementary and Other Sectors (Cluster) (ghh consult)



In order to better utilize the tourism potentials in Montenegro and in order to prolong the season, which has been concentrated on the summer months so far, one should proceed from a stronger diversification of the tourist product in the future.

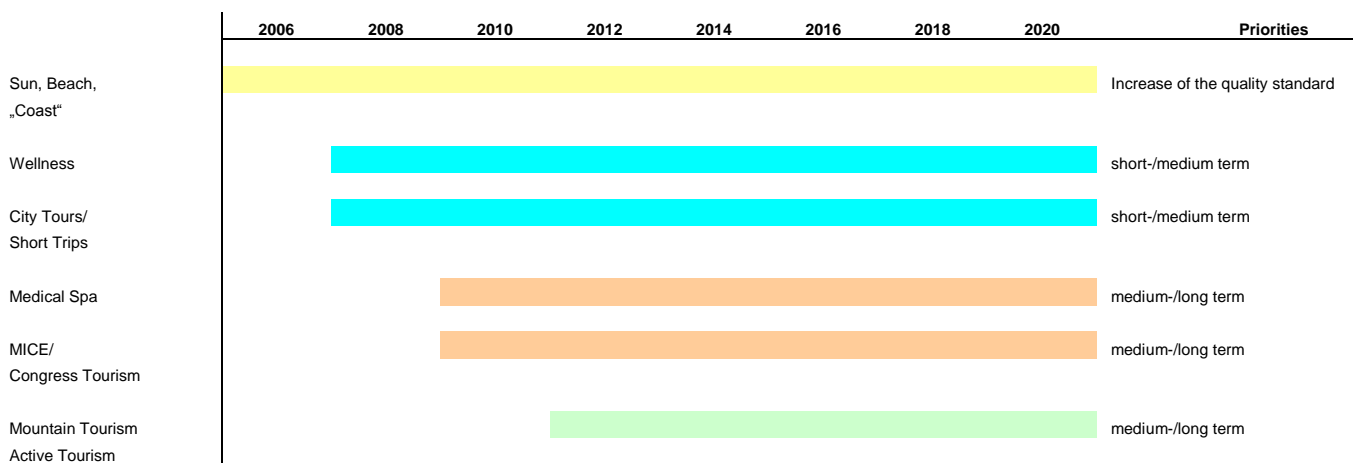
<i>Accommodation; Hotel and catering industry</i>	Hotel Sector (Management, Front Office, Housekeeping, F&B, etc.), Para-hotel Sector, Camping, Private Rooms and Vacation Homes, Restaurants, Event and Recreation Parks
<i>Tourism Relevant Public and Private Institutions</i>	Ministries, Tourist Boards, Information Offices, Tourist Associations and Organizations
<i>Transportation Companies</i>	Railways, Airlines, Public Regional Passenger Traffic, Shuttle-services, Nautics
<i>Operators and Mediators</i>	Tour-operators (Incoming and Out coming), Travel Agencies, Agencies, Ticketing
<i>Further Segments/Diversification</i>	Tourist/Mountain Guides, Animators, „Event“/ „Incentive“ Agencies, Congress and Conference Tourism, Wellness, Medical Spa, Active Vacation Offers (Rafting, Trekking, Skiing, Sports Offers, etc.), Rural

Tourism (Village Tourism, Rural Tourism, etc.)

The planned diversification of the tourist products in Montenegro was one of the central items of the presentation of the Montenegrin Minister of Tourism at a press conference during ITB 2006 in Berlin. The minister also emphasized the intensive efforts of Montenegro to sustainably elevate the quality level of tourism.

- Apart from the classical “sun and beach” product, Montenegro possesses, in particular, large potentials for the development of the “Wellness” segment as well as the Medical Spa segment (health tourism) and for the development of the MICE-segment (Meetings, Incentives, Conventions, Exhibitions) i.e. Congress and Conference Tourism.
- As far as the Marina segment with the required services to be established is concerned, Montenegro has large potentials within the future development of tourism (development of “Blue Flag Marinas”).

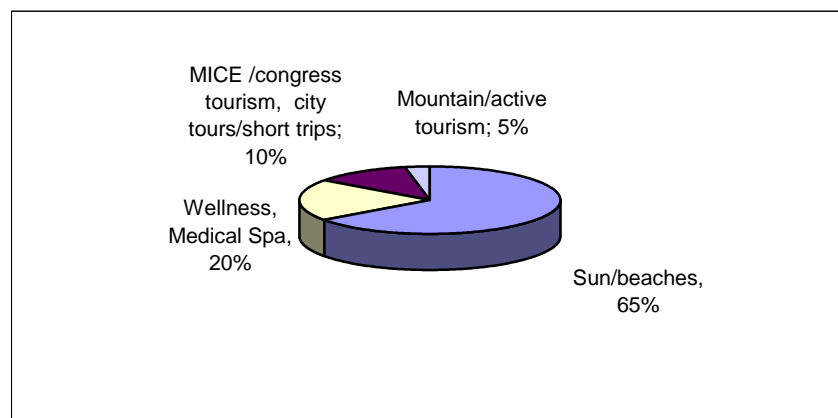
This puts appropriate new demands on the HR in tourism, in order to meet the requirements of the guests and tourists in various segments. In the medium and long term, offers for mountain tourism/winter sports, national parks and in rural regions (in combination with the Coast and the Skadar Lake) will become more and more important. Among others, a need for qualified mountain and tourist guests and specialized agencies will exist. Priorities in the diversification of the tourist product in Montenegro can be illustrated as follows:



*Diversification of the tourist product in Montenegro
Increased and differentiated requirements concerning the HR sector*

Referring to the ca. 25,000 (full-time) jobs in Montenegrin tourism in 2016, as forecasted by WTTC, we can proceed from the following distribution of human resources in the medium or long term:

- 65% (corresponds to ca. 16,250 jobs) in the classical segment „Sun, Beach“ (Coast),
- 20% (ca. 5,000 jobs) in the segment “Wellness“ and “Medical Spa”,
- 12% (ca. 3,000 jobs) in the area „City Tours/Short Trips” and in MICE/Congress Tourism,
- 3% (ca. 750 jobs) in the area of Mountain and Active Tourism (skiing, trekking, rafting, etc.).



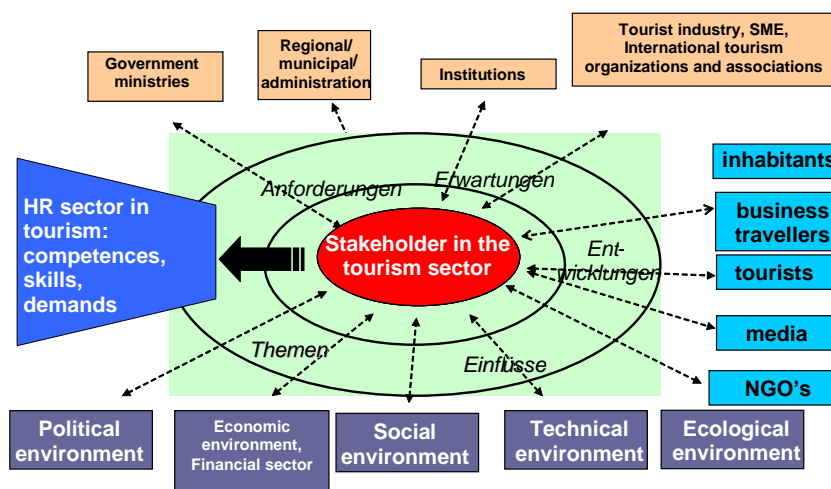
*Medium- to long-term Need for Qualified Specialists Compared to the Various Tourism segments
(Source: ghh consult)*

It should be noted that the employees – in particular taking into account the tourism structure in Montenegro – often cannot be assigned to one tourist segment only, but that there are overlapping with other segments; this will happen even more in the future and it emphasizes once more the growing demands on the HR in tourism.

- ☛ **This explains that the Human Resources in tourism are facing the challenge to harmonize the future qualitative needs for a diversified tourist product with the quantitative trends of demand and requirements.**
- ☛ **The demand should be differentiated as follows:**
 - ☛ **Demand for bed capacities,**
 - ☛ **Demand for tourist services,**

👉 Demand for qualified specialists.

Also when considering the environment of the tourism sector, it becomes clear that special demands, i.e. competences, skills and proficiencies are made on the Human Resources in tourism. From a large number of directly and indirectly participating players as well as by developments and influences from the political, economic, social, technical and ecological environment, there are also various and multiple expectations concerning the Human Resources in tourism.



Derivation from Demands on the HR in Tourism (Source: ghh consult)

The urgent necessity of a differentiated HRD Strategy appears from the above mentioned heterogeneity and complexity of tourism and the resulting new, i.e. heavily changing demands on the employees.

3.2 Specific Requirements of the Tourism Sector Concerning the Qualification System

The growing requirements of the tourism sector concerning specialists with

- a high degree of flexibility,
- knowledge of foreign languages,
- readiness to render services, sociable ness,
- practical skills and

- with a high level of know-how about the various branches and segments within the very complex tourism sector³

can not meet the present supply of specialists on the labor market in Montenegro. Even the growing demand for specialists with the above mentioned competences, skills and proficiencies cannot be met by the current offer of qualification services for the tourism sector. Instead of the competence profile, i.e. standards derived from the specific demand of the tourism sector, in Montenegro still exist too closely delimited job descriptions (e.g. waiters, i.e. „service technicians“; cooks; “tourist technicians“, etc.).

In international tourism, education and advanced training systems concentrate more and more on achieving a competence customization, which enables a flexible engagement of specialists, not only in several areas and divisions of one company, but also in various enterprises. This is necessary on the basis of the heterogeneous structure of the supply in tourism with many participating branches and segments and, on the other hand, by the multiple structure of the demand. In particular, in a tourist destination as Montenegro, whose diversification process in tourism has a large significance for the achievement of a sustainable prolongation of the season, there is a high need for diversified qualification services and differentiated competence profiles. Specialists must be able to adjust to the various expectations and requirements of the individual (demand) segments in tourism (national/international demand, classical sun/beach tourism, wellness, MICE/congress tourism, etc.).

Consequences and demands:

↳ **The need for a vocational education, i.e. qualification system, which complies with the very specific conditions of the tourism sector, proceeds from the above mentioned demands.**

↳ **Taking into account the heterogeneity and the requirement of the competence profiles to be developed in tourism, certain qualification services (for the macro-, mesa- and also for the micro-level) should not be organized in Montenegro only (restricted resources, lack of capacities); the appropriate skills and knowledge must therefore be acquired abroad, e.g. within internships (co-op programs), semesters abroad, exchange programs, etc.**

↳ **The international requirement also proceeds from the harmonization efforts at EU level (which is manifested, among others, in the “Copenhagen Declaration” from November 2002, “Achieving the Lisbon Goal” in November**

³ Cf. ILO: Human Resources Development, Employment and Globalization in the Hotel, Catering and Tourism Sector . Geneva, 2001.
Cf. CEDEFOP: Trends and Skill Needs in Tourism. Luxembourg, 2005.

2004 as well as in the ILO-report “Human Resource Development, Employment and Globalization in Hotel, Catering and Tourism Sector”).

↳ The concentration of the vocational education, i.e. qualification system on the tourism sector with various elements requires considerable financial resources.

3.3 Reference to Development Policy Cross-cutting Issues

The Human Resources Development Strategy (HRD Strategy) in the tourism sector of Montenegro has a high relevance relating to development policy cross-cutting issues:

- **Poverty Reduction:** The tourism sector also offers a chance to earn money, i.e. additional sources of income, in regions with a high poverty level. This is, e.g., possible by tourism relevant services or offers (private accommodation, sales of home-made products/handicraft, gastronomic offers, etc.) and it can often be realized without large investments. A sustainable contribution to poverty reduction can be given by specific measures in the area of human resources development.
- **Equal Gender Chances (Gender Aspect):** Tourism is traditionally a sector, which employs a large number of women and in which their employment can be promoted. Hence, the HRD Strategy promotes equal chances for both genders.
- **Environmental Protection and Resources:** Montenegro pays much attention to the development of sustainable tourism, which protects the human environment and resources. Thus, this is taken into account within the development of competence, i.e. vocational standards, the development of curricula and of capacity development. The HRD Strategy provides the required parameters accordingly.
- **Conflict Prevention:** Factors like understanding among nations, meetings with foreign, i.e. new cultures and, in certain areas, also cooperation among various tourist service providers in cross-border tourism are essential for tourism. This is how the tourism sector and the HRD Strategy for tourism respectively contribute to conflict prevention.

4 Development of the Tourism Sector in Montenegro

4.1 Economic Significance of the Tourism Sector in Montenegro

Tourism belongs to the sector with the highest priority for the Government of Montenegro. In 2005, the accommodation facilities of Montenegro registered around 5,212 million overnights, out of which 1,580 million guests from abroad. Already 5.66 million overnights have been registered in the first nine months of 2006, out of which 2.07 million from European source markets. (*Source: Ministry of Tourism*)

According to the current evaluation of the World Travel & Tourism Council (WTTC), it is forecasted that the contribution of the tourist industry to the gross domestic product for 2006 will be 15.7%, and an increase up to 22.8% is anticipated by 2016. For the time being, according to WTTC (Forecast: Oxford Forecasting Institute), 14,500 full-time jobs have been recorded in the tourist industry. This does not cover casual and seasonal workers typical for the tourism sector. According to the Statistical Almanac 2005 (MONSTAT), in 2004, around 9,600 employees were employed in the hotel and restaurant sector only. The growth rate in jobs within the tourism sector amounted, according to WTTC, to 17.55% in 2004 and 12.00% in 2005; for 2006, a growth of 12.49% is forecasted. On the average, according to WTTC, the number of jobs in tourism in the forthcoming 10 years will increase by ca. 750 jobs p.a., which corresponds to an average growth rate of 5.16% p.a. By 2016, a growth up to around 24,500 jobs is forecasted; and more than 80% will be employed at the "Vocational Level" in hotels and restaurants. This WTTC forecast corresponds, first of all, to a conservative approach, if we take into account the number of 75,000 jobs as anticipated in the Tourism Master Plan for Montenegro for 2020. If this is compared to the reports about the labor market of Montenegro (full-time employees in 2003 according to the ETF survey from 2003: 168,470; according to MONSTAT in 2005: 187,333), then the large macro-economic significance of the tourism sector becomes even clearer.

4.2 Development of Supply and Demand in the Tourism Sector

The tourism sector is very heterogeneous and covers many individual branches and divisions. So far, it has been demonstrated that the focus of future development will be in the area of hotel (i.e. accommodation) and catering (i.e. gastronomy) industry. That is why it is necessary to show the actual and future development in the area of accommodation capacities, as this is an indicator for the dynamic change and significant increase of tourists.

4.2.1 Supply Development

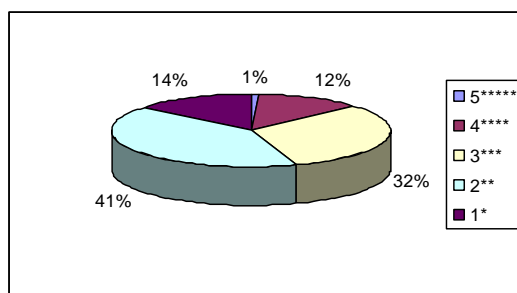
On the basis of the Master Plan from 2001, the development of the supply is planned to be 26,000 hotel beds, the increase by 2010 up to 50,000 hotel beds and by 2020 up to 100,000 hotel beds. Current statistics for 2005 about the total accommodation offer in Montenegro exist only in some areas. The statistic data in Monstat only show the number of guest arrivals and overnights, but not the number of hotel enterprises and beds or the occupancy rate of the hotel capacities. The average hotel standard in Montenegro has improved during the last years. In the spring of 2005, the Tourism Organization of Montenegro published a hotel catalogue. Almost all accommodation enterprises from the group "Hotels" in Montenegro are listed in the „Hotel Directory 2006“. This Hotel Directory contains 214 companies. The number of beds in the country amounts to over 37,500. They are distributed over 15,200 rooms, corresponding to a relation of 2.5 beds per room.

A classification of hotels, based on the internationally usual five stars system, has been introduced and concluded.

	5 *****	4****	3***	2**	1*	Total
Hotels	2	26	68	88	30	214
Rooms	43	1248	5474	6804	1662	15231
Beds	92	2748	12695	18410	3615	37560

Review of the Hotel Market in Montenegro (Source: www.visit-montenegro.org)

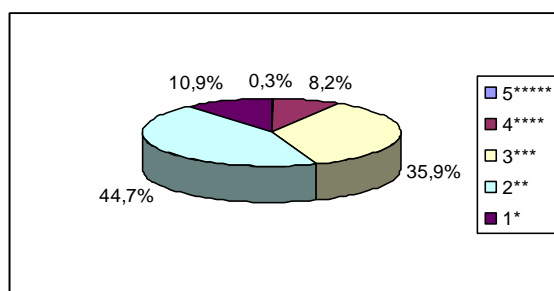
One part of the more than 37,000 beds is offered in hotel apartments with 1-5 beds and more. This mainly relates to hotels of the medium and lower quality segment.



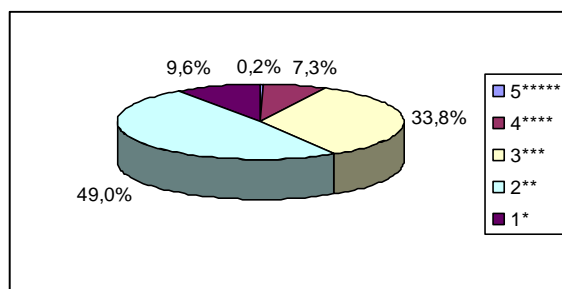
Hotel Market Montenegro, Share According to Star Category (Source: www.visit-montenegro.org)

The highest share, more than one half of the hotel market, is represented by 1 and 2 star hotels (55%). More than one third of the hotels are classified with 3 stars. The hotel industry in the higher segment is represented by 13% of the market only. The picture

concerning the distribution of rooms and bed capacities is similar. More than 50% of the capacities are covered by the hotel industry of the lower segment. The medium segment, i.e. 3 stars category, covers one third of the capacities, while less than 8% of the beds and rooms are offered in the higher hotel segment.



*Distribution of Rooms in Montenegro According to Star Category in percents
(Source: www.visit-montenegro.org)*



*Distribution of Beds in Montenegro According to Star Category in percents
(Source: www.visit-montenegro.org)*

When distributing hotel companies in the regional sense, it is emphasized that the tourist focus is situated on the Coast. More than three fourth of the hotel enterprises (76%), as well as the main part of hotel industry in the higher segment can be found there.

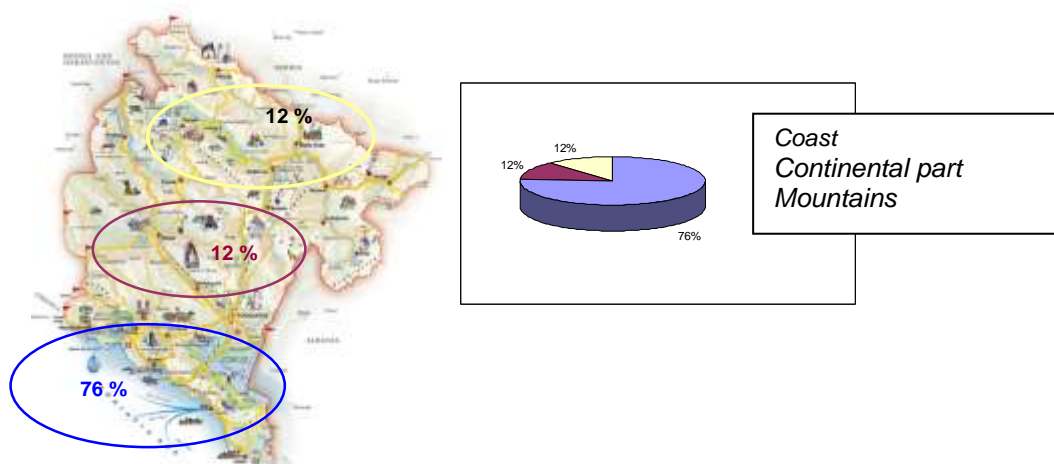
	5 *****	4****	3***	2**	1*	total
Coast	2	20	44	71	26	163
Continental part		6	14	6		26
Mountains			9	12	4	25

Regional Distribution of the Hotel Industry in Montenegro (Source: www.visit-montenegro.org)

22% of the companies are located in the continental part, i.e. the hinterland of the coast, and the mountain region each. It should be noted that the number of hotels with a lower

star classification is larger when penetrating farther into the continental part of the country

Regional Distribution of Hotels in Montenegro (Source: ghh consult, according to: www.visit-montenegro.org)



	1997.				2004/2005.				2010.			2020.		
	Statistics		Evaluation		Statistics				Plan			Plan		
Hotel	Beds	%		Beds	%	Beds	%		Beds	%		Beds	%	
Total	25,879	100	27.5	25,879	10.1	37,560	100	30.5	50,000	100	22.2	100,000	100	35.7
L / 5*****	240	0.8	--	240		92	0.2	--	2,500	5	1.1	10,000	10	
A / 4****	4,489	17.3	4.8	4,489	1.8	2,748	7.3	2.2	15,000	30	6.7	40,000	40	
B / 3***	20,830	80.5	22.2	20,830	8.6	12,695	33.8	10.3	20,000	40	8.9	40,000	40	
C / 2**	273	1	--	273	--	18,410	49.0	14.9	12,500	25	5.6	10,000	10	
D / 1*	47	0.2	--	47	--	3,615	9.6	2.9	--	--		--	--	
Camping	18,492		19.7	18,492	7.6	8,791		7.1	15,000		6.7	15,000		3.6
Private accomm.	19,592		20.8	78,434	32.3	55,349		44.9	50,000		22.2	50,000		17.9
Other	30,033		32.0	30,033	12.4	12,814		10.4	15,000		6.7	15,000		3.6
Apartments				90,090	37.1	8,719		7.1	95,000		42.2	95,000		39.3
Total	93,996		100	242,28	100	123,33		100	225,000		100	225,000		100

Development Strategy of Bed Capacities (Source: Tourist Master Plan of Montenegro)

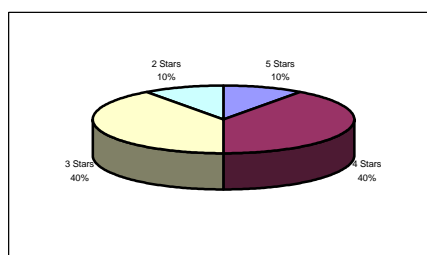
According to the Ministry of Tourism, the present accommodation capacities (beds) and accommodation capacities that may be expected in the coastal region in the future are distributed as follows:

	Hotel sector			other types of accommodation	
	Existing bed capacities	New bed capacities	Total capacities by 2020	Existing reg. beds	Planned reg. beds
Herceg Novi	4.843	10.000	14.843	21.362	50.000
Kotor	1.555	5.500	7.055	4.649	17.000
Tivat	1.820	4.500	6.320	3.418	17.000
Budva	13.751	10.000	23.751	30.664	75.000
Bar	6.414	5.000	11.414	8.606	65.000
Ulcinj	6.810	32.000	38.810	26.080	76.000
Ukupno	35.193	67.000	102.193	94.779	300.000
Master plan			100.000		280.000

*Present and Planned Accommodation Capacities in the Coastal Region
(Source: Ministry of Tourism of Montenegro)*

The number of ca. 100,000 beds, as provided for by the Master plan in the hotel sector by 2020, corresponds to 45,000 to 50,000 hotel rooms. This room capacity represents a basis for the analysis of required workforce and the analysis of needed qualifications to be derived.

The distribution of bed capacities according to hotel categories is forecasted, according to the Ministry of Tourism, by 2020, as follows:



Distribution of Bed Capacities i.e. Room Capacities in the Hotel Sector According to Categories by 2020 (Source: Ministry of Tourism and Environment of Montenegro)

The growth of room capacities and the shift within the categories to the favor of higher quality hotels (4 and 5 stars) is demonstrated in the following review:

2006. 2013. 2020.

Category	room	room	Room
5*	40	2.500	5.000
4*	1.340	10.000	20.000
3*	6.100	10.000	20.000
2*	9.520	2.500	5.000
Total	17.000	25.000	50.000

Forecast of Room Capacities in Hotels by Category

(Source: ghh consult, according to „Tourist Accommodation Strategy“, Ministry of Tourism and Environment of the Republic of Montenegro, 2006)

In order to make an analysis of the required workforce for the area of hotel and catering industry (as a relevant sub sector of the tourism sector), the forecasted room capacities are converted hereinafter into the number of hotels, according to categories and in a plausible way. For 2006, the number of hotels was taken from the Hotel Directory for Montenegro.

Forecast of the Number of Hotels by Categories by 2020 (Source: ghh consult, according to the „Tourist Accommodation Strategy“, Ministry of Tourism of the Republic of Montenegro, 2006)

Category	Average number of room	No. Hotels 2006.	No. Hotels 2013.	No. Hotels 2020.
5*	75	2	33	67
4*	90	26	111	222
3*	100	68	100	200
2*	45	118	56	111
Total	310	214	300	600

This change of structure in the area of hotels, which means a clear increase of the quality level, has direct consequences on the requirements of the guests as well as on the demands on the specialists in the tourism sector; here in particular in the hotel sector. Apart from hotel capacities, the Ministry of Tourism forecasts by 2020 the following bed capacities:

- Private accommodation 160,000 beds
- Campings: 10,000 places

4.2.2 Tourist Demand Development

In 2004, the accommodation facilities in Montenegro registered around 700,000 guest arrivals with 4.56 million overnights, of which 73% domestic guests and 27% foreign guests. While the overnights of domestic guests were divided in three parts, i.e. one third

each in hotels, private accommodation and other accommodation, 60% of the foreign overnights were realized in hotels and only 16% in private accommodation. 96% of all overnights were concentrated in the Coastal region.

Geographic Concentration of the Overnight Demand in 2004 (Source: ghh consult)



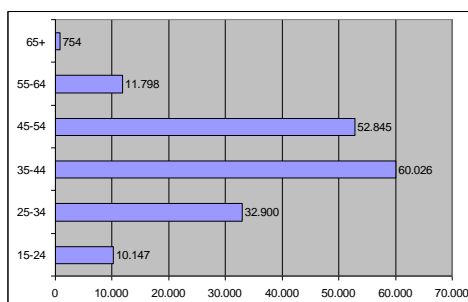
Core statements about the tourism sector in Montenegro

- **In the medium and long term, the tourist offer in Montenegro will not only experience a quantitative expansion, but also a qualitative shift towards higher quality offers. Moreover, in the future, the tourist offer will be continuously diversified in order to open up new markets and target groups and to provide the prolongation of the season.**
- **This has direct consequences on the Human Resources in tourism: in any case, more qualified specialists will be required, who have to satisfy, first of all, the diversified tourist offer and, parallel to that, the expectations of the tourist industry.**
- **On the basis of the concentration of the demand for overnights in the coastal region that can be foreseen in the medium and long term, the education and advanced training offer in this Region will be required as a priority.**

5 Workforce Requirement in the Tourism Sector of Montenegro

5.1 The Labor Market in Montenegro

According to the report of the European Training Foundation (ETF) on the labor market of Montenegro⁴, the number of employees in Montenegro has varied from 1999 to 2003 between 268,000 and 277,000. In 2003, there were around 168,000 full-time employees, who were divided into the following age groups:



Full-time Employees in Montenegro According to Age Groups, 2003
(Source: ghh consult, according to the Labor Market Review of Montenegro (ETF))

According to their educational achievement (diploma), the employees can be divided as follows:

Total	187333
No education	1411
Incomplete primary education	8032
Primary school	18939
Secondary education	117760
Higher education	15989
University education	25200

Employees in Montenegro According to their Diploma, i.e. Educational Achievement
(Source: Statistic Almanac 2005)

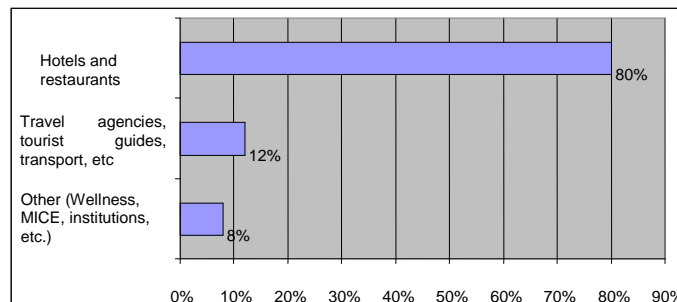
⁴ ETF: Labor Market Review of Montenegro, Working paper (Draft). 2006.

5.2 Workforce in the Tourism Sector

The current situation and future forecast for the tourism sector in Montenegro are represented as follows:

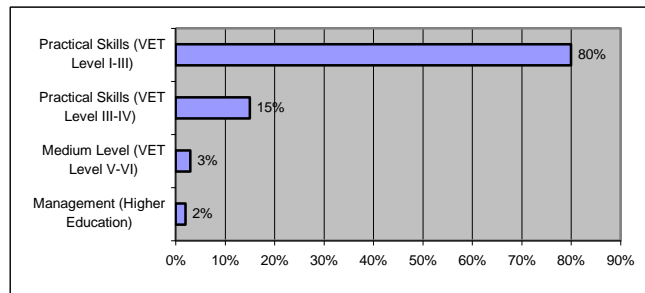
- According to WTTC (Forecast: Oxford Forecasting Institute), there are about 14,500 full-time registered jobs in the tourist industry at the moment. The growth rate in full-time jobs assigned to the tourism sector amounted to 17.55% in 2004 and to 12.00% in 2005; a growth of 12.49% is forecasted for 2006.
- In the forthcoming 10 years, ca. 750 jobs p.a. will be added on the average, which corresponds to an average growth rate of 5.16% p.a.
- By 2016, a growth up to around 24,500 full-time jobs is forecasted; more than 80% should be covered by personnel with a „Vocational Level” in hotels and restaurants.

On the basis of the forecasted development of supply and demand in the Tourism Master Plan for Montenegro, the following need for qualified personnel will appear in the medium and long term:



Medium- to Long-term Need for Qualified Specialists; Divided in Branches (Segments) Within the Tourism Sector

A distribution of the need for qualified specialists with different task and competence profiles in an enterprise and thus also for various education and advanced training demands results in the following picture, in the medium and long term:



Distribution of the Need for Qualified Specialists According to Qualification Levels (Source: ghh- consult)

5.3 Forecast of Required Specialists in the Hotel and Catering Sector

Derived from the forecasted development of room capacities by the year 2020, the average need for employees per room has been assessed for each respective hotel category. These values have been established on the basis of experience values from the international hotel industry, and on the basis of the values that should be applied in Montenegro, for 2006, 2013 and 2020 (analog to the hotel capacities for these periods as forecasted by the Ministry of Tourism).⁵ Summarized and differentiated by the various levels (I - VII), we can demonstrate the following future need for qualified specialists in the hotel and catering sector by 2016 (proceeding from the current situation in 2006):

Hotel & Catering	210 Hotels	in 2006	260 Hotels	in 2011	450 Hotels	in 2016
Management Level VI-VII	1%	100	2%	400	3%	600
Middle Management Level V-VI	4%	400	5%	800	6%	1.200
Department Heads Level IV	15%	1.500	16%	2.800	18%	3.700
Level I-III	80%	10.000	76%	13.000	73%	15.000
TOTAL :		12.000		17.000		20.500

Current and Future Need for Qualified Specialists in the Hotel and Catering Sector (Source: Calculations ghh consult, 2006)

☞ Apart from the significant increase of the quantitative need for qualified specialists in the hotel and catering sector, the increased share of such need at higher levels (Level IV to VII), which will be required in the future, should be particularly emphasized.

⁵ Cf. Detailed Calculation and Derivation of the Need for Qualified Specialists in the Hotel and Catering Sector as attached

5.4 Forecast of Required Specialists in the Area of Travel Agencies

According to the Montenegro Tourism Association, there are 190 travel agencies at the moment; i.e. 133 tourist agencies and 57 tour operators. While the larger agencies have up to 40 and more employees, a large number of tourist agencies employ only 1 or 2 persons. Some travel agencies employ their own tourist guides, who have been taken into account when mentioning the above specialists. There are also approximately 150 free-lance, independent tourist and travel guides⁶. In compliance with the job descriptions defined by WTO in the area of travel agencies and tour operators, the need for qualified specialists – differentiated by levels – can be presented as follows:

Tour & Travel Operations	2006		2011		2016	
	Level	Quantity	Level	Quantity	Level	Quantity
Agency Manager	V-VI	190	V-VI	240	V-VI	280
Head of Ticketing	IV	190	IV	240	IV	280
Head of Tour Programmes	IV	190	IV	240	IV	280
Sales Manager	IV-V	100	IV-V	150	IV-V	190
Ticketing Clerk	II-III	200	II-III	300	II-III	350
Tour Leader	III-IV	80	III-IV	120	III-IV	160
Tour Guide	III	200	III	300	III	350
Cashier	II-III	150	II-III	200	II-III	200
Driver	I-III	180	I-III	280	I-III	300
Total:		1.480		2.070		2.390

Need for Qualified Specialists in the Area of Travel Agencies, Tour Operators, Tourist Guides; Differentiated by Levels (Source: Calculations ghh consult, 2006)

5.5 Forecast of Required Specialists in Other Areas of the Tourism Sector

A summary is given for other areas of the tourism sector, i.e. of the segments: airlines, other transportation companies (bus, rent-a-car, etc.), tourism organizations (associations, NTO, LTO, etc.) and authorities (ministry, etc.).⁷ The areas of tourism organizations and authorities have the following need for qualified specialists, differentiated by levels:

⁶Cf. Detailed Calculation and Derivation of the Need for Qualified Specialists in the Area of Travel Agencies as attached

⁷Cf. Detailed Calculation and Derivation of the Need for Qualified Specialists in Other Areas of the Tourism Sector as attached

		2006		2011			2016	
Tourism Organisations	Level	Quantity		Level	Quantity		Quantity	
Director of Tourism	V-VI	20		V-VI	25		V-VI	25
Chief of Marketing	V-VI	10		V-VI	15		V-VI	15
Chief of Planning and Development	V-VI	10		V-VI	15		V-VI	15
Marketing and Promotion Specialist	V	20		V	30		V	40
Public Relations Officer	V	10		V	15		V	15
Tourism Planning Specialist	V	15		V	20		V	20
Tourism Statistician	V	5		V	10		V	10
Tourist Facility Standard Specialist	V	5		V	10		V	10
Tourism Training Specialist	V-VI	5		V-VI	10		V-VI	10
Tourist Information Service Clerk	III-IV	20		III-IV	40		III-IV	50
Total		120			190			210

Need for Qualified Specialists - Differentiated by Levels in the Areas of Tourism Organizations and Authorities in the Period from 2006 to 2016 (Source: Calculations ghh consult, 2006)

For the area of transportation companies, airlines and airports, the need for qualified specialists is presented as follows:

		2006		2011			2016	
Transport, Airlines / Airport	Level	Quantity		Level	Quantity		Quantity	
Management	VI-VII	75		VI-VII	100		VI-VII	120
Chief of Marketing	V-VI	20		V-VI	30		V-VI	40
Marketing and Promotion Specialist	V-VI	50		V-VI	70		V-VI	80
Public Relations Officer	V-VI	20		V-VI	25		V-VI	35
Controlling	IV-V	50		IV-V	70		IV-V	90
Accountant	IV	80		IV	120		IV	130
Ticketing Clerk	III-IV	150		III-IV	200		III-IV	250
Driver	III-IV	250		III-IV	300		III-IV	310
Assistant Driver / Transport	III	150		III	200		III	220
Pilot, Officer	VI-VII	25		VI-VII	35		VI-VII	50
Flight attendant	IV-V	30		IV-V	50		IV-V	75
Total		900			1.200			1.400

Need for Qualified Specialists – Differentiated by Levels – in the Areas of Transportation, Airlines and Airports in the Period from 2006 to 2016 (Source: Calculations ghh consult, 2006)

5.6 Summary: Need for Workforce in the Tourism Sector

We summarize the need for qualified specialists in the tourism sector by 2016, differentiated by different branches:

- Hotel & Catering
- Travel Agencies, Tour Operators, Tourist Guides
- Other: Airlines, Transportation, Tourism Organizations, Authorities

	2006 Specialists	2011 Specialists	2016 Specialists
Hotel & Catering	12.000	17.000	20.500

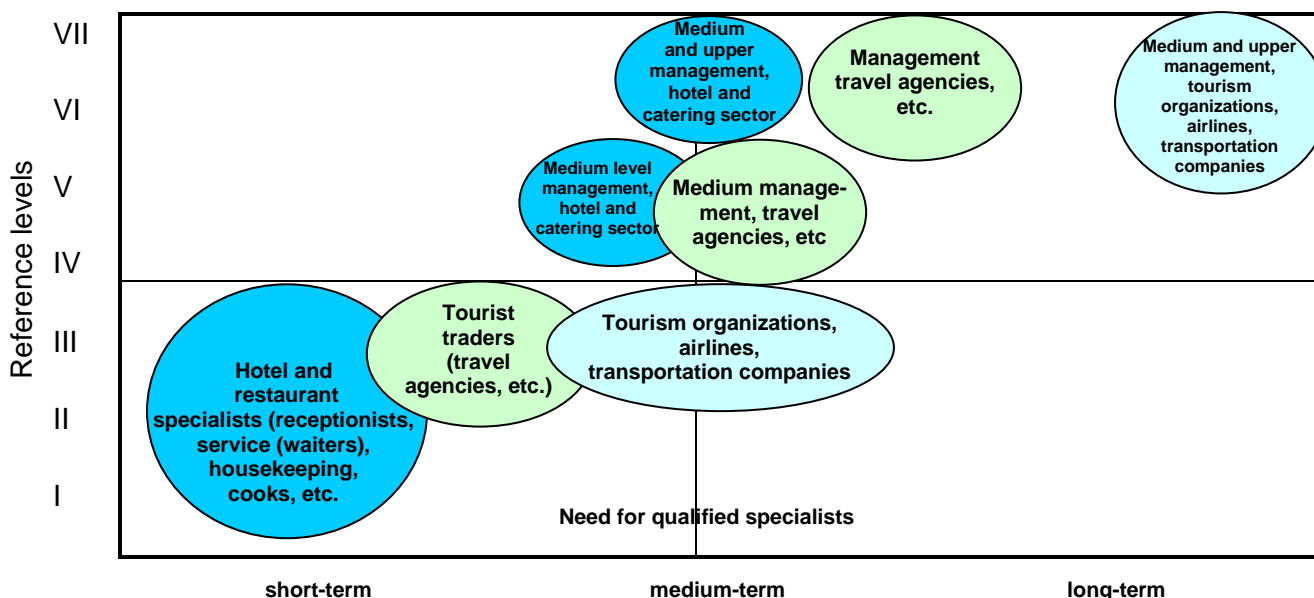
Travel Agencies	1.480	2.070	2.390
Other	1.020	1.380	1.610
Total	14.500	20.450	24.500

*Need for Qualified Specialists in the Tourism Sector in the Period from 2006 to 2016
(Source: Calculations ghh consult, 2006, according to WTTC dates)*

The total need for qualified specialists has been established on the basis of WTTC data.

The need for several thousands of seasonal temporary/casual workers, who partly come from abroad and are particularly employed in the hotel and catering sector, has not been taken in account in this table.

The need for qualified specialists in tourism, differentiated by branches and levels as well as by priorities, is given hereinafter:



Need for Qualified Specialists in the Tourism Sector in Montenegro by Branches and Levels as well as by Priorities (Source: ghh consult, 2006)

Core statements about the need for workforce in the tourism sector of Montenegro:

- From the present ca. 14,500 full-time jobs in the tourism sector, around 83% refers to the hotel and catering sector, ca. 10% to the sector of travel agencies and ca. 7% to other areas.
- By 2016, a growth up to ca. 24,500 full-time jobs in tourism is forecasted. The above mentioned percent shares of particular areas will remain approximately the same. Hence, the highest need for qualified specialists is established in the hotel and catering sector.
- Out of the additional 10,000 qualified specialists by 2016, ca. 56% will refer to Levels I-III, 27% to Level IV and 17% to Levels V-VII.
- Apart from the quantitative need for qualified specialists, which is significantly increasing, the future increased share of staff with higher education levels (IV to VII) should be particularly emphasized.

6 Qualification Services for the Tourism Sector of Montenegro

6.1 Summary of the Current Situation of the Education/Qualification System in Montenegro

The qualification system (qualification system understood as the totality of formal and non-formal qualification for various qualification levels) of Montenegro is mainly operated by the state, under the main responsibility of the Ministry of Education and Science and the Ministry of Labor. Only a small number of private qualification service providers are available for the time being; thus, a market for qualification services is only in the initial phase. Accordingly, the predominating part of qualification services for the tourism sector are provided by state-operated educational institutions (schools, centers, universities), and in particular by the system of vocational and adult training. Several years ago, the Montenegrin government started a comprehensive reform of the education system, and in particular of the vocational training system, with the support of international organizations (EU, GTZ, etc.). Essential parameters have successfully been changed in the meantime, which are also important and useful for the development and implementation of the Human Resources Development Strategy (HRD Strategy) in tourism. The following facts are particularly significant for the HRD Strategy in tourism:

- There is an explicit political will to reform the education system;
- The institutional establishment of the reform process by Councils for adult education and vocational training as well as by the Center for Vocational Training offers a high potential for continuous optimization of the system structures and the qualitative and quantitative adjustment of the qualification offer, in particular also for the tourism sector;
- The readiness to implement the reforms together with relevant social partners, in particular with enterprises and chambers, opens up innovative possibilities for the undertaking of labor market- and practice-oriented configuration of qualification measures;
- Differentiated legal bases like the Law on Education and Vocational Training have already been prepared and adopted, and important rules and regulations are being revised: the National Qualification Framework that relies on EU (is being prepared), the Certification Law (is being prepared), accreditation of qualification services, the university has completed adjustments according to the “Bologna Criteria”, etc.;
- Partly flexible cooperation between enterprises and educational institutions have been initiated;
- The Dual System of vocational education, incorporated in the law, can be developed;
- The first approaches and qualification concepts for the education of vocational training staff are available;
- There are possibilities of a close interconnection and cooperation with projects/programs of the EU/CARDS and GTZ/vocational training and the human environment, among others, as well as in the regional environment (Balkans).

Essential challenges still have to be overcome, not only within the vocational training reform but also within the HRD Strategy:

- Reliable data about the labor market required for a strategic orientation, and information systems required in order to establish valid i.e. convincing data about the need for qualification do not exist;
- The lack of coherence between different components of the qualification systems are to be eliminated;
- An overall financing concept has not been developed yet;
- So far, there has hardly been any market orientation of the VET sector and hardly any promotion of competitive structures;
- Lack of quality assurance and a marketing + development system;
- It is established that most school/education centers still have a low or medium standard as far as the allocation of resources, the assignment of educational means and equipment, qualified teaching staff according to the most up-to-date standards and requirements, as well as management competences are concerned.

6.2 Structure of Qualification Service Providers for the Tourism Sector

The following text gives a simplified review of educational institutions/qualification service providers, which directly offer tourism relevant educational studies and training courses. At the same time, the first locations are established within the qualification framework for vocational training (draft as a reference framework, as the National Qualification Framework (NQF) has not been adopted yet) with its defined qualification levels (Levels) in order to get the first differentiated evaluations about the needs of adjustment and improvement. Referring to the different levels (I-VII), the offer of tourism relevant qualification services can be demonstrated in a simplified way, as follows:

General Education Schools

For the time being, there are 236 schools in the area of elementary and secondary education in Montenegro. The school time amounts to at least eight years (age: 7-14 years) in elementary school. Attending secondary schools (3 or 4 years) is free of charge. The school time in grammar/high schools (“gymnasium”) amounts to four years, and that is also valid for technical and art schools. There are no special tourism-specific contents within the curricula. No vocational preparation and no vocational counseling are offered, in particular for vocations and activities in tourism. Foreign languages that are important for tourism are still learned inadequately in general education schools.

Vocational schools (VET schools, i.e. Schools for Vocational Education and Training) Operated by the Ministry of Education and Science

Within the reform of the formal vocational education system, under the overall control of the Center for Vocational Education, as was already mentioned above, significant steps have been made, as for example: preparation of legal norms and vocational standards, new educational programs, school programs/curricula, providing equipment for schools,

training of teaching staff and school directors, development of new occupations/vocations, development of industrial relations.

The 36 vocational schools are subordinated to the Center for Vocational Education. The areas: Trade, Catering and Tourism are offered in 16 schools. In the school year 2004/2005, 3,731 students were recorded in VET schools (2002/2003: 3,854; Source: VET Center). According to the Center for Vocational Education, 90 to 95% of the students achieve their graduation (diploma). The tourism relevant offer of qualification services in VET schools consists of 6 job descriptions, which are designated as follows:

- Waiter (Level III)
- Cook (Level III)
- Confectioner (Level III)
- Service Technician (Level IV)
- Cook Technician (Level IV)
- Tourist Technician (Level IV)

Other vocations for the area of travel agencies/tour operators as well as for the areas of sports, fitness and (medical) wellness are not offered. While education for the first three vocations is offered on the basis of traditional curricula, the 3 last mentioned vocations have been developed within the vocational education reform and they were introduced in 2004 only. The „Service Technician“ (Level IV) learns, apart from education for “Waiter” (Level III), also organizational skills, management and marketing. Accordingly, he does not only have the possibility to become a waiter, but also a manager or restaurant manager. The “Cook Technician” (Level IV) learns, apart from the education for “Cook” (Level III), also organizational skills, management, marketing and international cuisine. Accordingly, he does not only have the possibility to become a cook, but also a kitchen manager. The “Tourist Technician” (Level IV) can, after his education, e.g., work at the reception of a hotel or in a travel agency. As far as the very definition is concerned, a “tourist technician” corresponds approximately to a management assistant in tourism. The internship (co-op program) within the education of the VET schools lasts one month. The Dual System, which is provided for in the Law on Vocational Education, is not implemented in the education for tourism vocations. Hence, the practical share of education in vocational schools is too small, as the scarcely offered internships in hotels are not sufficient for providing the required practical skills.

The diploma of the vocational school entitles graduates to get a qualified job in line with their educational achievement. Indeed, according to the data of the VET center, only a small number of graduates want to get an employment, most of them want to take up a university study after having completed the vocational school. The reason for this is, on one hand, the low level of attractiveness of vocations, i.e. activities in this area and the relatively low possibilities of earning money. On the other hand, tourist enterprises

believe, like before, that graduates of vocational schools are mostly inadequately qualified and have insufficient practical skills.

Training Centers and Training Programs Operated by the Ministry of Labor/ Employment Agency of Montenegro

Within its employment policy/employment measures and active labor market policy, the Employment Agency of Montenegro is implementing comprehensive (non-formal) education and advanced training programs. During the last 4 years, these qualification measures comprised 14,000 participants, of which 2,250 pertain to the area of Tourism and Gastronomy. (Source: Employment Agency of Montenegro). This corresponds to an annual average of ca 3,600 participants (Other sources mention less than 2,000 p.a.⁸). This is a multiple, regionally differentiated qualification offer, which should not only satisfy the needs of enterprises for qualified specialists (mostly Level I i II), but also the social demand of specific discriminated target groups. Target groups are in particular employed adults and unemployed persons, who should be enabled to get a new employment by these advanced training measures.

The Ministry of Labor is responsible for the operation of three training centers in Berane (wood processing), Herceg Novi (tourism and gastronomy) and in Podgorica (building industry). These centers are regionally oriented and should cover the specific needs of the respective region for qualification measures. In the future, the Center in Herceg Novi intends to educate each year 100 participants for the area of tourism and gastronomy.

For the hotel area, the Employment Agency of the Ministry of Labor has charged the Training Center Vuka Mitrovića “Gastronom Club” in Bečići to organize a three-months lasting “hotel training/education” (Levels I-II) for ca. 150 graduates p.a.

The (tourist) enterprises often have the same opinion about graduates of the above mentioned training measures like before, i.e. that the qualifications and competences of the graduates of these advanced training courses are inadequate and not sufficiently practice-oriented. Moreover, they are facing the competition of foreign seasonal workers, who are often preferred, as they require lower wages/earnings than the graduates of these qualification levels, although they have similar qualifications.

⁸Cf. ETF (Hg.): Labor Market Review of Montenegro. Torino, 2006, page 24

Private Hotel and Tourism College ISHTAP in Petrovac

In Petrovac, a private college (ISHTAP, International School of Hospitality and Tourism) is being established, which started education in the beginning of 2006. This academy is a “branch” of the Canadian School of Hospitality and Tourism in Algonquin/Ottawa and it wants to orient by the curricula, the didactic organization and the teaching methods of the Canadian example. A high practice orientation should be priority.

Universities, state and private

The state university of the country has its main seat in Podgorica. Its faculties are divided over five towns in the country. The state Faculty for Hotel and Tourism is located in Kotor with a total number of 900 students, a private university/Faculty for Hotel and Tourism Management exists in Bar with a total number of 526 students.

State Faculty for Tourism and Hotel Industry in Kotor:

The Faculty for Tourism and Hotel Industry with seat in Kotor was founded by a Decree of the Government of Montenegro on June 1st, 1999 (Official Gazette of the Republic of Montenegro, no. 21/99). By adopting the Law on University Education in 2003 and in conformity with the Bologna Declaration, the study programs and the duration of basic studies were changed. All three generations in the subject areas Tourism and Hotel Industry study nowadays in compliance with the Bologna Declaration and the study provisions of ECTS. Master (post-graduate) studies have already been organized in the field of Tourism. The approval for Master (post-graduate) studies in the field of Hotel Industry has been requested (and also for Doctoral studies in both subject areas). An application has been submitted for participation in TEMPUS- and INTER-REG III projects. The strategic main goal of the faculty is the internationalization of study programs.

Within the mentioned subject areas of the state Faculty for Tourism and Hotel Industry, the students can learn two foreign languages each (option: English, German, Italian, French and Russian).

Private faculty in Bar:

The Faculty for Tourism, Hotel Industry and Trade provides the following education:

Study Year	Study Course	Number of Students
I	BSc Management in tourism and hospitality	170
II	BSc Management in tourism and hospitality	220
III	BSc Management in tourism and hospitality	70
IV	Postgraduate specialist studies: ⇒ Management in tourism ⇒ Management in hospitality	27
V	Master studies (MSc): ⇒ Management in tourism ⇒ Management in hospitality	17
V	Candidates currently underway in masters thesis	22
TOTAL		526

Other Qualification Institutions for the Tourism Sector

New Tourist School of the „Swiss Business School“in Bečići

An agreement has been signed between the Swiss Business School and the company Imobilia (Budva), according to which a Faculty of Catering and Tourism should start with its operation from the new school year (2006/2007), in the hotels of the company Imobilia in Bečići. This is a three-year course of studies, whose program complies with the „Bologna Declaration“. It should accept about 30 to 60 students in the first year. The teachers should come from Germany, Austria and Switzerland; all lectures should be delivered in English. The goal should be to create an educational institution with a „lighthouse character“.

Language Schools

Most hotels, restaurants and tourism information bureaus have a lack of multilingual educated staff. There is an International Center for Foreign Languages in Podgorica, which is operated in cooperation with Oxford University. Foreign languages can also be learned at the institutes for foreign languages of the Faculty of Economics in Podgorica and at the Philological Faculty in Nikšić. Another possibility is the Italian Language Institute "Dante Alighieri" in Podgorica. Specific language courses, which refer to the hotel branch, do not exist.

Other

Practical advanced training is hardly implemented in tourist enterprises/hotels, first of all due to a lack of money. The American University in Kosovo organizes a IATA/UFTAA training program with a duration of five months (Diploma in Travel and Tourism Foundation; course fee: 1,100 EUR). The participants come, among others, also from Montenegro.

6.3 Capacity Considerations and Future Demands

The following table demonstrates the present capacities of different qualification service providers according to the number of students as well as according to the job description i.e. Level.

Qualification Service Provider/Institution	Capacity (Participants/Students)	Vocation/Level
VET schools	433 (school year 2004/2005) in total 13 VET schools	Waiter (Level III)
VET schools	438 (school year 2004/2005) in total 10 VET schools	Cook (Level III)

VET schools	286 (school year 2004/2005) in total 4 VET schools	“Service Technician“ (IV)
VET schools	330 (school year 2004/2005) in total 4 VET schools	“Cook Technician“ (IV)
VET schools	2,244 (2004/2005) in total 9 VET schools	“Tourist Technician“ (IV)
VET Schools Total	3,731 Students	Levels III-IV
Training Center Herceg Novi	100	III – IV
International School of Hospitality and Tourism Algonquin - Petrovac (ISHTAP)	25	V – VI
Faculty of Catering and Tourism (Company Imobilia/ Swiss Business School), Bečići (new; from 2006)	30 - 60 (planned)	V – VI
Faculty of Kotor	900	VI – VII
Faculty of Bar	526	VI – VII

*Review of Present Capacities of Qualification Service Providers in the Tourism Sector
(Source: Surveys ghh consult, 2006)*

According to the data of the VET Center that most Level III and IV students, after having graduated, do not take up a job but (want to) continue their studies at university, this means that there are each year only ca. 300 to 400 graduates available at the labor market (Source: Estimated value ghh consult) after having concluded the VET school (most of them are Level III graduates). In Levels V to VII there are annually ca. 400 to ca. 450 students, who can get an employment after graduating in the tourism sector. By 2016, we need another 10,000 qualified specialists in the tourism sector, of which ca. 56% with Level I-III, 27% with Level IV and 17% with Level V-VII. This creates – in particular in Levels III-IV – a large gap between the demand and the real supply of qualified specialists.

Number Levels	Need for additional qualified specialists p.a. by 2016	Current offer of additional qualified specialists p.a.	Deficit of additional qualified specialists p.a. (gap)
III	ca. 600	ca. 300	ca. 300

IV	ca. 300	ca. 100	ca. 200
V-VII	ca. 200	ca. 350	No additional need

Average Demand and Average Supply of Additional Qualified Specialists p.a. by 2016 (Source: Calculations ghh consult, 2006; Surveys of VET Center and Faculties, etc.)

This table shows a priority need for action in expanding the capacities of qualification services providers in Levels III and IV. The schools that educate staff for hotel and catering industry operate at the limit of their maximum capacity (work load). The lessons are held in double and sometimes in triple shifts.

On the basis of data that were made available by the Faculties for Tourism in Kotor and Bar relating to the number of students and the evaluated maximum number of qualified specialists by 2016 for Levels V-VII, it proceeds that there is no additional need for study capacities.

Educational institutions for medium management (e.g. restaurant manager, front office manager, F&B manager, controller, chief animator) are not available for the time being, although well-trained specialists with a well-founded education are required just in this area. An education with practical elements for specialists in superior positions and a "hands-on approach", as well as "training on the job" do not exist for the time being.

6.4 Evaluation of the Current Situation

6.4.1 General Assessment

The demand for qualification measures for specialists, management and administrative staff cannot be met by the current supply in an adequate manner, neither quantitatively nor qualitatively. The pressure to increase the number of graduates is even intensified by the employees that retire for old-age reasons. About 50% of the persons, who are still employed in tourism at the moment, will retire from their job for old-age reasons in the forthcoming years and their jobs will be taken over by qualified specialists. In most cases, the qualification services for the tourism sector do not comply with the international standards and the education quality does not meet the demands of the tourist industry concerning qualified specialists (expectations of the tourists and also requirements of the international tour operators). One of the largest deficits is mainly the lack of practice relevance of the educational measures, which is extremely important, in particular due to the explicit client orientation in the tourism sector. The orientation towards vocations with a mostly constrained curriculum and with an education time of 3 or 4 years (instead of broad competence profiles) hardly enables a flexible usability of

specialists in tourism. Due to the lack of interconnection between theory and practice and the lack of plurality of the teaching locations, a competence profile oriented towards operating procedures is not realized. The education and advanced training of the teaching and management staff has not been structurally developed in a continuous way and it has not been institutionally incorporated either. In particular for the advanced training of the teaching staff (teachers, trainers), there is a large need for systematically structured qualification in the sense of personnel development and according to the Lifelong-Learning principle.

6.4.2 Instructions Relating to a Didactic and Methodical Education Quality

The curricula of the vocational schools and training centers are partly overloaded by contents and theory, and frequently do not meet the current demands. The practical work in enterprises is insufficient. Practice-oriented simulation methods are hardly used, as e.g. for training in reception, accounting, controlling, warehouse/cellar, commodity purchase, housekeeping, kitchen/restaurant, bar, laundry and other spheres of activities. The equipment of teaching/learning aids as an overhead projector, screens, photocopy machines, flip charts, TV and video is, as a rule, still insufficient. An acceptable PC-equipment is not available either in all facilities; the use of Internet has been very modest so far. There is no introduction in modern hotel and gastronomy specific software programs in the education (Examples: HOGATEC, FIDELIO, PROTEC). The contents of textbooks have not been updated. During the last years, the schools have not been refurbished, although there are some exceptions (e.g. VET in Herceg Novi). Both the equipment and furnishings in the buildings (teaching kitchen, teaching restaurant) and the building substance are frequently in a bad state.

In the future, management education must offer even more contents relating to tourism specific accounting and controlling, marketing and strategic management, personnel management, yield management and internet networking. Moreover, it is necessary to develop an understanding of hotel techniques, organization and decoration and, in particular, of IT-skills.

Core statements about the qualification market for the tourism sector in Montenegro

- **The current capacities (supply of qualification services) are far from satisfactory and cannot cover the need for qualified specialists in the tourism sector, which will strongly increase in the future.**
- **The quality of education should be improved in general, i.e. it should be optimized with an orientation towards EU-standards with simultaneous diversification of the qualification offers.**

- With an additional need of 10,000 qualified full-time specialists by 2016, there is an average annual need for ca. 1,000 specialists p.a. in the forthcoming 10 years. Out of this number, ca. 55% refer to Level III, 27% to Level IV and 17% to Levels V-VII.
- On the basis of the current capacities of the tourism relevant qualification service providers, there is an average annual gap of ca. 300 qualified specialists of Level III, 200 qualified specialists of Level IV and 100 qualified specialists of Levels V-VII. The need for higher levels (VI-VII) can – as is usual in other countries too – partly be covered by staff from other relevant faculties (e.g. business economics).
- Thus, the priority need for action consists of expanding capacities of tourism relevant qualification service providers in Levels III and IV with a focus on the hotel and catering sector.
- Measures should be undertaken in order to develop priority new vocational profiles/standards.
- For the area of non-formal education, it is necessary to undertake measures relating to a systematization of the qualification programs and their target group specific differentiation as well as the providing of their quality by standardization.

7 Vertices of Future Human Resources Development (HRD) for the Tourism Sector

The description of the vertices of a future Human Resources Development Strategy as well as recommendations for its implementation proceed, as derived, from the following main assumptions:

- Tourism is one of the most important economic branches (if not the most important one), with the strongest development in Montenegro and it records a significant increase in accommodation figures.
- A competitive tourism sector contributes to the creation of new jobs and thus to the avoiding of emigration from the region. By an established education, adjusted to the needs of the economy, the ability of graduates of qualification

measures to find a job is increasing at the same time. This also represents a contribution to poverty reduction in Montenegro.

- The growth increases the need and the demand for workforce for various activities; well-educated specialists and thus an improved quality of the offers are the basis for a higher level of competitiveness of the Montenegrin tourism sector.
- Qualified and competent managers and specialists, needed for high-quality tourism that complies with contemporary demands, are not available to a sufficient degree.
- The existing qualification system, relating to formal and non-formal education, does not comply with the quantitative and qualitative current and future needs of the tourist industry for the time being.

7.1 Goals

Super ordinate Goals

The availability of qualified and competent human resources for the economically high priority tourism sector is targeted by the development of specific qualification services and institutions for this sector as well as the orientation of the current reform of the educational and vocational training system towards the needs and demand of the tourism sector.

Objectives

- The existing Human Resources Development Strategy in the tourism sector of Montenegro offers to the decision-makers of the competent ministries and enterprises in the sector a basis for orientation and decision-making.
- The Strategy enables the Government of Montenegro to allocate subventions and the modest resources of the country towards the most important priorities with the largest possible cost-benefit relation and thus make available sufficient qualified specialists to the growing tourism sector and contribute, at the same time, to its further growth.
- The strategy aims, first of all, to the increase of efficiency and effectively of the available educational capacities and it is oriented towards already present strategies for the development of the tourism sector as well as towards the needs of the enterprises.

7.2 Key Issues

The following essential challenges and necessities proceed from the foregoing analysis for the implementation of a HRD Strategy:

- ⇒ *Concerted social partnership, i.e. industrial realization of the HRD Strategy for tourism, in particular with private enterprises*
- ⇒ *Complementarily between the HRD Strategy for Tourism and the educational system/reform and labor market policy*
- ⇒ *Improvement of the quality of existing qualification offers*
- ⇒ *Increase of the qualification capacities*
- ⇒ *Diversification and flexibilization of the qualification offer*
- ⇒ *Current adjustment of the qualification offer to local demands*
- ⇒ *Providing of EU specific requirements*
- ⇒ *Providing of funding for the implementation of the Strategy.*

7.3 Recommendations for Interventions in Key Areas of a HRD Strategy

7.3.1 General Provision

The HRD Strategy in tourism is not only directed to current and short-term established qualification needs by non-recurrent courses and programs, but also develops a medium and long term prospective by the structural establishment and integration of the development of human resources for the tourism sector into the current reform of the complete qualification system of Montenegro, not only of formal but also of non-formal education. High importance is also assigned to a close connection with the labor market i.e. the employment system. It is also important to proceed from a qualification market as an adjustment mechanism between the supply and demand of qualification services. This is how the total qualification offers and service providers, state and private, in formal and non-formal education and advanced training system, can be used as potential service providers in order to cover the specific demand and supply of the tourist industry for a diversified offer of qualification measures. As the offer of private qualification services and also the in-house advanced training in general and especially in the tourist industry in Montenegro has been underdeveloped so far, the state-operated qualification institutions will, like before, have the main task to promote and guarantee the supply of the tourist industry by qualified specialists. In the medium and long term, an expansion of educational capacities by private qualification service providers should be targeted and this should also enable a larger market orientation.

Such a systemic view of the HRD for the tourism sector assumes that the implementation of the HRD Strategy should be a joint action of the relevant participating state and private actors and stakeholders and that it should be realized in line with the state rules and legal regulations in the sense of a regulated qualification market.

The following four key issues, which are recommended for high priority interventions, are presented for a systematic and structured procedure when implementing the HRD Strategy for Tourism:

- Institutional, organizational and regulatory parameters
- Qualification service providers and educational capacities

- Qualification offers in compliance with the labor market
- Capacity Development

7.3.2 Institutional, Organizational and Regulatory Parameters

The elaboration and implementation of the HRD Strategy cannot be performed by the Ministry of Tourism alone, but only by partnership and work share cooperation of the various participating actors with their individual competences and responsibilities. This requires the creation of control bodies and working groups for specific tasks of the concept development and implementation of concrete measures and projects. It will also be an essential task to raise funds and to acquire money on the basis of a realistic funding concept of both budget funds and foreign funds (donor, PPP).

- ⇒ Cooperation and social partnership, i.e. industrial dialog
 - Creation of an inter ministerial harmonization body/Council for HRD Tourism (in the changed continuation of the now existing inter ministerial working group) for the control of implementation and, if necessary, adjustment of the HRD Strategy, under overall control of the Ministry of Tourism (primus inter pares) and with participation of the private sector.
 - Establishing of working groups with special tasks (WG)
 - WG Regulations and Organization
 - WG Qualification Institutions and Service Providers
 - WG Qualification Offers and Measures, Formal
 - WG Qualification Offers and Measures, Non-formal
 - WG Capacity Building
 - Participation and regular harmonization with projects/programs of international donors relevant for HRD – Tourism, in particular GTZ – Vocational Training and Tourism Projects as well as EU measures (CARDS)
- ⇒ Review of legal and regulatory parameters
 - Adjustment of the National Qualification Framework (NQF) relating to an appropriate incorporation of the tourism sector
 - Development of vocational careers/advancement opportunities for key vocations within the NQF
 - Review of the existing vocational profiles/standards relating to their level of adjustment to the need of the tourist industry
 - Development of a concept for promotion of Public Private Partnerships within the HRD
- ⇒ Improvement of the reputation and attractiveness of vocations, i.e. vocational activities and demonstration of employment possibilities in the tourism sector by early vocational counseling in the educational system and measures that affect the public

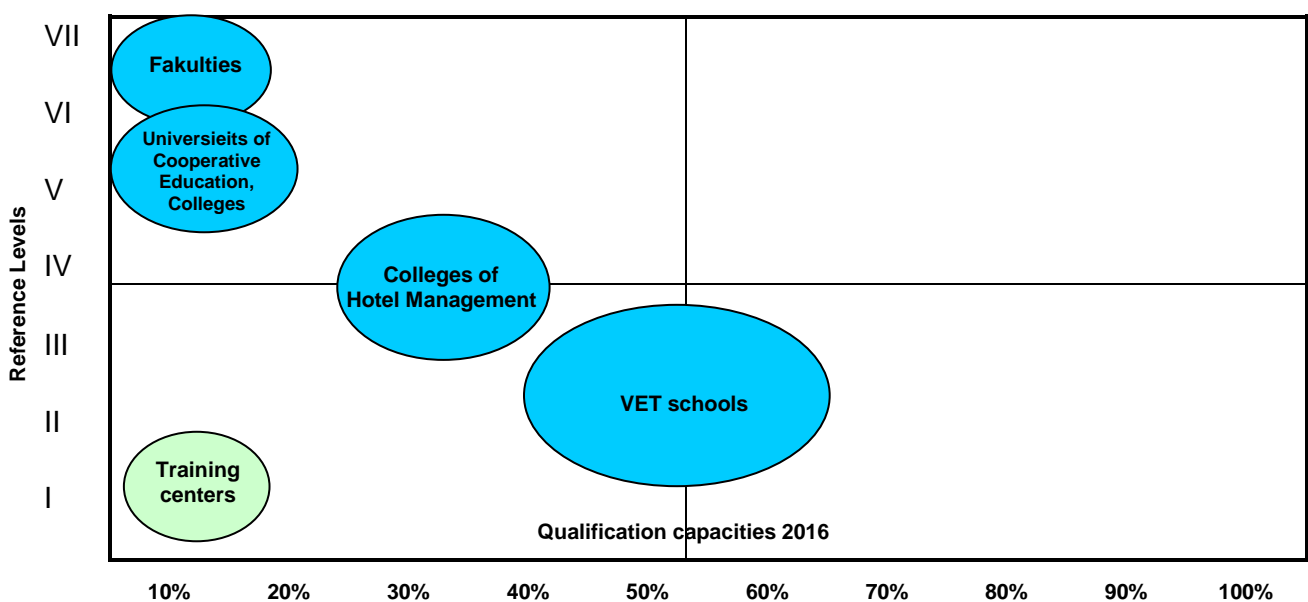
- ⇒ Development of a general funding concept for implementation of the HRD Strategy in Tourism
 - Explanation of the funding possibilities for the expansion of existing, i.e. the construction of new capacities
 - Expansion of co financing incentives by PPP
 - Promotion of earning revenues by services and course taxes, also for state institutions
 - Examination and assessment of the possibility of realizing voucher allocation and/or individual education credits, in particular for qualification measures for unemployed persons operated by the Ministry of Labor
- ⇒ Intercommunication with tourism relevant international organizations and institutions, preferably within the EU.

7.3.3 Qualification Service Providers and Educational Capacities

The previous analysis has demonstrated that the capacities of the Montenegrin qualification system are not sufficient for meeting the forecasted increase of the need for qualified specialists and managers. An optimization of existing schools and centers as well as the establishing of new qualification institutions is therefore necessary. This can be achieved by expanding the existing institutions, but also by establishing new independent institutions. In order to provide advanced quality tourism, the guarantee of a high quality standard (maximum standard in stead of minimum standard) is required for qualification services. Reference schools and institutions, which can induce, in the medium or long term, such high standards on all levels (“pull effect”) should serve to this end.

- ⇒ Increase of capacities by optimization of the maximum capacity (work load) and by expansion of the existing institutions
 - Expansion of the capacities of vocational schools for existing vocations and vocations to be developed
 - Expansion of the capacities of the training centers and measures of the Ministry of Labor, in particular in the area of seasonal workers and within employment policy programs (employment measures, advanced training for the tourism sector; see *Appendix: Profile Training Center*)
 - Increase of the capacities in the university area (Kotor, Bar)
 - Increase of the capacities for operational training shares (internships /co-op programs/, dual system) and in-house training and advanced training measures (training on the job; personnel development of the enterprises)
 - Use of the educational offers of international service providers and organizations
- ⇒ Establishing “Centers of Excellence” (CoE) in the area of vocational schools as reference schools with a high quality standard

- Identification of 3 vocational schools (2 on the Coast, 1 in the hinterland) as pilot schools for revised and new vocations for the tourism sector on the basis of a CoE concept to be developed and selection criteria to be defined
- ⇒ Increase of capacities by building new institutions for high quality education in the area of vocational training and post-secondary study with a high share of practice for the tourism sector (dual principle)
- Feasibility study with the goal: Establishing a professional school/college for high priority vocations in the hotel and catering sector according to reference profile “College of Hotel Management“ (see *Appendix*)
 - Feasibility Study with the goal: Establishing of a University of Cooperative Education for the education of management and leading staff for high priority needs in various tourism sub sectors according to reference profile „University of Cooperative Education“ (see *Appendix*)
- ⇒ Increase of the autonomy of qualification institutions when organizing education and making up a location specific offer
- ⇒ Establishing of a current local cooperation and harmonization between qualification service providers and the economy in order to adjust the education measures and the curricula to the local needs
- ⇒ Promotion of cooperation plans between enterprises and qualification service providers (PPP)

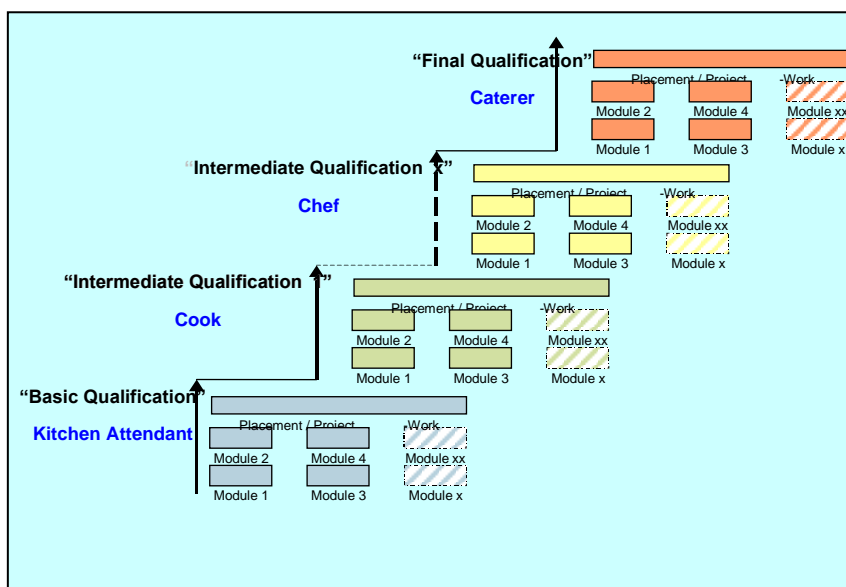


7.3.4 Qualification Offers in Line with Need and Demand

The present spectrum of recognized vocations and activity profiles corresponds to the demands of the tourism sector in a limited way only. The qualification gap should be closed; the qualitative qualification deficit should be reduced. According to the discussion in Europe, the HRD Strategy is oriented to a stronger flexibilization of education and to the providing of complete vocational competence of action as a continuous didactic principle. Key qualifications as well as orientation towards operating procedures are integral parts of the providing of decision-making and responsibility, which are required in order to overcome complex situations. The operating procedure orientation contains the organization of learning along with operating procedures. Important elements are e.g. the combination of learning locations (in-house practice, theoretic lessons with reference to practice and the additional use of other learning locations). A complete understanding of the creation of a product or a service, which enables the trainee to determine his relevance in the process, is of basic importance

- ⇒ Improvement of the information position through the labor and qualification market of the tourism sector in order to provide qualification offers in compliance with the need and in order to achieve an early recognition of new demands
 - Development and installation of a simple labor market – information system (LMIS) for the tourism sector
 - Development and installation of a simple vocational information system and a data base about educational and advanced training possibilities as well as a list of the relevant qualification service providers for the tourism area
 - Carrying out differentiated analyses of qualification needs for selected vocations/activities
- ⇒ Expansion of the qualification offer for new vocations and activities in the tourism sector
 - Development and introduction of new vocational profiles, i.e. standards for high priority tourism areas on the basis of the analysis of operational and labor processes in the enterprises
 - Hotel and Catering Industry
 - Tour Operators, Travel Mediators and Travel Agencies
 - Sport, Animation, Fitness, Wellness
 - Transportation Companies
- ⇒ Providing certification within the national Law on Certification and the NQF

- ⇒ Review and modernization of the existing curricula for formal and non-formal education and improvement of the labor process relevance of qualification offers for the tourist sector
 - Procurement of key qualifications and entrepreneurs' competences
 - Enhanced practice-orientation and increase of the practice share in the curricula by
 - the Dual System in line with the Montenegrin Law on Vocational Education
 - expansion of operational practices
 - modernization, i.e. expansion of learning kitchens and learning restaurants, use of learning offices, education on the basis of projects, etc.
 - Expansion of education in the area of tourism relevant foreign languages
- ⇒ Introduction of innovative pedagogical concepts and learning stimulating environments in compliance with the trends and standards in the EU as well as the use of information and communication technologies (ICT)
- ⇒ Flexibilization of education and advanced training by far-reaching modularization in the course of careers to be developed, i.e. adjusted in line with the following picture:



Example for Modularization: Hotel Industry (Kitchen)

7.3.5 Capacity Development

Within the HRD Strategy, Capacity Development refers to the qualified and management staff of enterprises and institutions in the tourism sector and the qualification system. By education and advanced training of this target group, an enhancement of their

institutions is directly or indirectly promoted. The teaching staff (teachers, instructors and trainers) receive a key position concerning the improvement of the quality of qualification measures; without well-educated teachers, a good education is hardly possible.

This addresses to the following target groups in particular:

- Teachers, instructors and trainers of schools, in enterprises and other state and private qualification service providers
- Management and officials of qualification service providers (e.g. school directors, etc.)
- Medium and high management in enterprises of the tourism branch
- Decision-makers in the ministries and in the economy

The orientation of Capacity Building in the Montenegrin tourism sector should be in line with international standards. It is therefore recommended to obtain the accreditation of existing and newly introduced courses through the UNWTO.TedQual Certification System, a quality assurance system developed by UNWTO for education and advanced training in the tourism sector. Moreover, an intercommunication with the „EU-EQT Competence Network“ should be implemented, which has developed a high modular system for education in the tourism area that is appropriate for integration into various national educations and advanced trainings, i.e. as reference concept.

⇒ Education and advanced training of teaching staff for the tourism area

- Appointing and education of teacher trainers/mentors (TOT = Trainers of Trainers) as multipliers (preferably of teachers of the Centers of Excellence to be established)
- Development of a general concept for institutionalized advanced training of teaching staff in the Centers of Excellence; Reference: Study Seminar; see *Appendix*
- Development of a modularized advanced training concept for teachers, trainers, instructors for implementation in one of the Centers of Excellence to be established
- Realization of high priority advanced training measures for teaching staff

⇒ Education and advanced training for the management of schools/ qualification service providers (school directors, managers of educational institutions, instructors in enterprises) in the tourism area

- Advanced training measures for HRD management, in particular for the tourism sector
- Improvement of the standard of knowledge in business economics and management

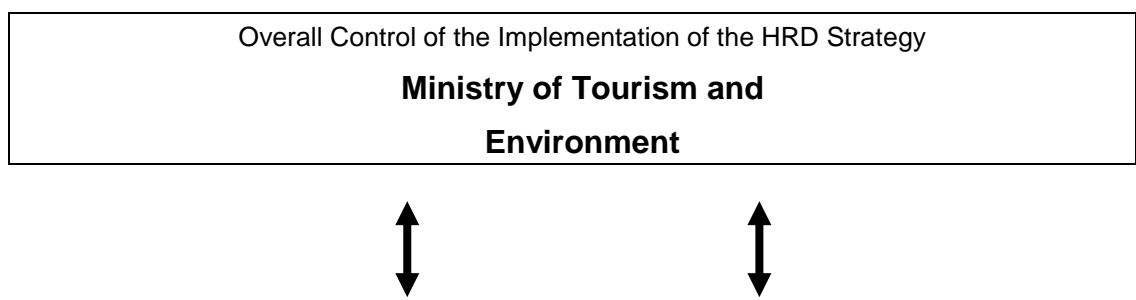
⇒ Information and advanced training for decision-makers in the ministries, qualification service providers and in the economy

- Participation in exchanges of experience (national and international)
- Participation in conferences

- ⇒ Education and advanced training of capacities for medium and higher management of the tourism branch in the university area
- Feasibility Study with the goal: Introduction of a Bachelor course for „Hospitality and Tourism Management“ and a Master course (relying on the Bachelor course) for „Tourism Development“ at the existing universities
 - Courses (e.g. CEFE courses of GTZ) for tourism relevant SME's in the northern part of Montenegro (tourism development in the hinterland)
 - Management course for hotel and catering industry

7.4 Organizational Structure for Implementation of the HRD Strategy

A sustainable implementation of the HRD Strategy for the tourism sector requires a good organizational structure. An inter ministerial working group was established for following up the elaboration of the Strategy, represented by the Ministry of Labor, the Ministry of Education and the Ministry of Tourism. For further processing and conclusive preparation of the Strategy, this WG should continue to exist. An organizational structure in line with the following scheme is proposed for the implementation of the Strategy



Advisory Council for HRD – Tourism

**Ministry of
Tourism and
Environment**

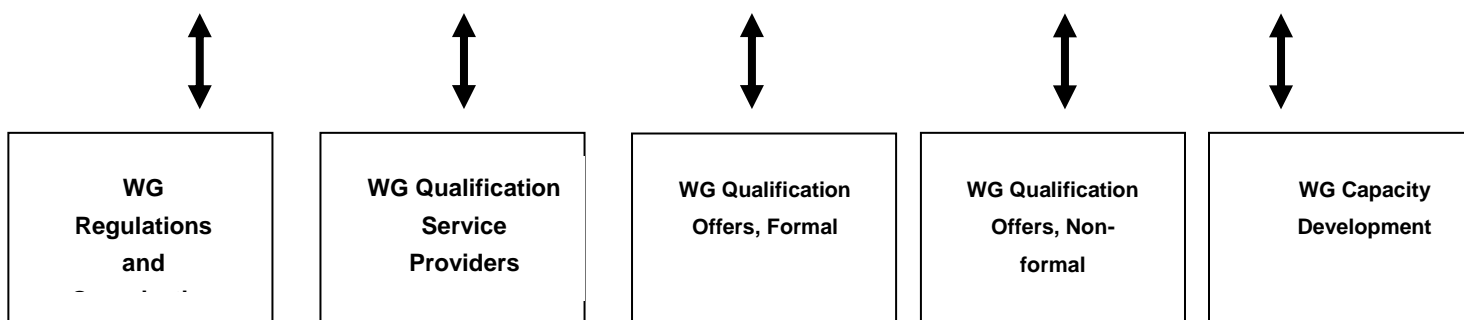
- **Ministry of
Education and
Science**
- **VET center**
- **Universities**

- **Ministry of
Health, Labor and
social insurance**
- **Employment
Bureau**

**Private Economy
(Private
Educational
Institutions,
Tourism
Association,
Enterprises)**

Funding Model

Monitoring & Evaluation



Monitoring & Evaluation

The monitoring and the documentation of the total process of implementation of the HRD Strategy for Tourism should be under the overall control of the Ministry of Tourism and Environment. The competent working groups (WG) will be competent for the monitoring of partial tasks, i.e. components to be realized and they will inform the Advisory Council about their results. The evaluation of partial components will be decided and adopted by the Advisory Council.

7.5 Time schedule

Implementation Plan of HRD Strategy in Tourism

Item	2007	2008	2009 - 2010	2011 - 2012	2013 - 2014
Organization and Regulations					
A.1.1. Preparing and adopting the HRD Strategy	■				
A.1.2. Establishing of the Council for HRD Tourism	■	■			
A.1.3. Establishing of working groups with defined tasks	■	■			
A.1.4. Examination and adjustment of the National Qualification Framework (NQF)	■	■			
A.1.5. Development of professional careers in tourism and vocational counseling			■		
A.1.6. Measures for image improvement of vocations in tourism				■	
A.1.7. Development of a funding concept for HRD in tourism					■
A.1.8. Intercommunication with international HRD institutions					■
Qualification Service Providers					
A.2.1. Increase of education/qualification capacities					
A.2.1.1. Vocational schools		■	■		
A.2.1.2. Training centers/measures of the Ministry of Labor		■	■		
A.2.1.3. Universities (Bar, Kotor, Podgorica)		■	■		
A.2.1.4. Enterprises (in-house advanced training)			■	■	
A.2.2. Upgrading of 3 vocational schools to Centers of Excellence		■	■		
A.2.3. Feasibility study and concept elaboration of the College for Hotel Management		■	■		
A.2.4. Feasibility study and concept elaboration of the University of Cooperative Management		■	■		
A.2.5. Establishing of local coordination bodies			■	■	
A.2.6. Cooperation between qualification service providers and the economy (PPP)			■	■	
Qualification Offers					
A.3.1. Development and introduction of an LM and HRD information system		■	■		
A.3.2. Carrying out of differentiated analyses of qualification needs		■	■		
A.3.3. Development and introduction of new vocational profiles and curricula		■	■		
A.3.4. Certification concept in compliance with national and international standards		■	■		
A.3.5. Review and modernization of existing curricula by modularization, increase of practice shares by dualization, foreign languages, ICT-use and education		■	■		
A.3.7. Junction of innovative methodical and didactic concepts		■	■		
A.3.8. Development and implementation of high priority education programs		■	■		
A.3.9. Implementation of diversified qualification measures		■	■		
Capacity Building					
A.4.1. Education of teaching staff instructors/multipliers		■	■		
A.4.2. Development of a general concept of institutionalized education of teachers		■	■		
A.4.3. Development of a modularized concept for advanced training of teachers		■	■		
A.4.4. Implementation of priority advanced training of teachers		■	■		
A.4.5. Advanced training of HRD manager (school directors, education managers)		■	■		
A.4.6. Information and advanced training for decision-makers		■	■		
A.4.7. Feasibility study and development of a concept of study courses BSc and MSc		■	■		
A.4.8. Advanced training for tourism managers		■	■		

8 Literature

CARDS (Hg.): Perspectives Paper: National Vocational Qualifications in Montenegro. Podgorica, 2004

CEDEFOP (Hg.): Trends and Skill Needs in Tourism. Luxembourg, 2005

DEG (Hg.): Tourism Master Plan for Montenegro. Cologne/Podgorica, 2001

ETF (Hg.): Labor Market Review of Montenegro. Torino, 2006

ILO (Hg.): Human Resources Development, Employment and Globalization in the Hotel, Catering and Tourism Sector. Geneva, 2001

World Bank/International Monetary Fund (Hg.): Poverty Reduction Strategy Paper Montenegro. Podgorica, 2002

WTO (Hg.): Guide for Local Authorities on Developing Sustainable Tourism. Madrid, 1998

All data refer to tourist institutions and the results of the tourist season were taken over from the Ministry of Tourism and Environment.

Data on employment in this area are different in three sources:

1. Official statistical data of Monstat
2. EFT Labor Market Review – 2003
3. WTTC Report about Effects in Tourism in Montenegro

The data of Monstat are most recent and the other two sources have a broader insight in the labor market. These two sources date from 2003 and 2005. In the mean time, the main data for these forecasts have changed, but not in an essential way. The structure of the labor market has not changed in the last three years, so that these reports are very useful for the further definition of the HRD Strategy.

The data about the VET school were obtained from the Ministry of Education.

The data about faculties and other educational institutions are the result of surveys in these institutions.

Appendixes

A 1 Types of Practice-oriented Qualification Service Providers

A 1.1 College for Hotel Management

International colleges for hotel management aim at the deepening and supplementing of professional education and vocational experience of young professionals in the hotel industry by business economics knowledge. Theory and practice are very closely connected. Certain labor areas are processed by simulation methods. In Germany, for example, there are state institutions (diploma: hotel business economist recognized by the state; school time: 2 years) but also private initiatives of hotel enterprises. Qualification service providers at the level of a College for Hotel Management are located between Schools for Vocational Education and Training (VET schools) and the tertiary area.

Profile of Demand on Qualification Service Providers at the Level of an Internationally Usual "College for Hotel Management"

Location	As near as possible to the tourist centers on the coast, where the tourist demand and thus also the demand on qualified specialists is concentrated
Theory/practice shares	50% theory; 50% practice
Maximum size per class/group	25 - 30 students
Special demands on arrangement and equipment	Premises and equipment suitable for practice (which enable simulation of situations in practice)
Specific qualification characteristics (competence profiles)	<ul style="list-style-type: none">✓Flexibility✓Knowledge of foreign languages (in particular English, German)✓Detailed knowledge of all departments in hotel and restaurant operation/in-house and business economics connections✓Basic knowledge about business economics and hotel specific professional knowledge✓Marketing and quality management✓Hotel specific IT knowledge, reservation systems, etc.✓Specific knowledge about the requirements of various target groups (tourists, wellness/Spa, congress, etc.) and business management relevance

Responsibility

Strong engagement of the private economy in order to achieve the highest possible interconnection between theory and practice and high quality standards

A 1.2 University of Cooperative Education

A close interconnection of theory and practice as well as a strong company reference (dualization) is supplied, e.g., by the Universities of Cooperative Education, which exist in Germany, and at which, inter alia, tourism relevant education areas i.e. subject areas like e.g. tourism business economics and fair and congress economics are offered. A University of Cooperative Education is a special educational institution in the tertiary education area, which shows, apart from a theoretic vocational study, also a strong practice orientation, as half of the study is held in an enterprise. A University of Cooperative Education is not a university; the graduate does not receive an academic degree, but a state diploma, e.g. as “graduate business economist”. Students conclude a three-year education contract with an enterprise and parallel attend a study course at a University of Cooperative Education. The semesters are divided in three-month theory and practice phases, which are held at the universities of cooperative education and in the companies respectively. Depending on the enterprise, stays abroad are possible too. The final thesis is written in agreement with the University of Cooperative Education. The principles of the University of Cooperative Education are:

- ☞ Plurality of the learning locations (dual principle);
- ☞ Interconnection of theory and practice;
- ☞ Cooperation and harmonization with the enterprises
- ☞ Practice orientation;

Profile of the Demands on Qualification Service Providers at the Level of a “University of Cooperative Education”

Location

Strategically favorable (e.g. Cetinje), near the Coast, where an interconnection with the private economy (reference enterprises) can be guaranteed.

Theory/practice shares

Theory 60%; practice 40%

Maximum size per class/group

Ca. 30 students

Special requirements on arrangement and equipment

Practice relevant equipment, e.g. for case studies, equipment with PC's, language lab

Specific qualification characteristics (competence profiles)

- ✓ Business economics (general and tourism specific)
- ✓ Marketing, quality management

- ✓ Accounting, Controlling
- ✓ Principles in tourism law (national /international); IATA principles (International Air Transport Association)
- ✓ Management models
- ✓ Knowledge of foreign languages
- ✓ Promotion of Social Skills
- ✓ Flexibility
- ✓ Mutual relations in international tourism

Responsibility

Private economy (strong company reference), support by the state

A 1.3 Training Centers

The Employment Agency organizes, for example, training measures (three-month hotel training) in the private training center “Gastro Mitrović” in Bečići. This center trains 150 students p.a. Taking into account the urgently required short term need for qualified personnel in the operational area (basic practical knowledge and skills), the establishing of at least one or two other institutions of this type is to be recommended.

Location

In the vicinity of the Coast (strongest demand for qualified personnel), on the medium and long term, if possible, also a training center in the central and northern part of Montenegro respectively

Theory/practice shares

Theory 30-40%; practice 60-70%

Maximum sizes per class/group

Groups as small as possible (20), and thus with a strong practice reference

Required demands on arrangement and equipment

Arrangement suitable for practice and simulation of work situations, a large share of practice, training possibilities

Specific qualification characteristics (competence profiles)

- ✓ Basic practical knowledge and skills (kitchen, restaurant, housekeeping, reception)
- ✓ Service orientation

Responsibilities

Public institution; support by the private

economy

A 1.4 Study Seminars of Teacher Training and School Director Training

Study seminars are places for practical education of teachers and school directors.

Target group

- School directors
- Teachers
- Trainers for teachers/mentors

Service offer

- Vocational didactics for various vocations/subjects
- Training of Trainers
- School law and school organization
- Methods and moderation training
- Discussion for current trends in the education and advanced training of teachers
- Apart from the above mentioned standard offers, additional offers are possible as well
 - Didactic platform on the basis of internet
 - E-learning and blended learning
 - Knowledge management

A 2 Detailed Calculation of the Need for Qualified Specialists in Focal Areas

A 2.1 Detailed Calculation of the Need for Qualified Specialists in the Hotel and Catering Sector

Derived from the forecasted development of room capacities by the year 2020, an average need for employees per room was assessed for each hotel category. These values were given on the basis of experience values from the international hotel industry as well as on the basis of values that are to be used in Montenegro, for the years 2006, 2013 and 2020 (analog to the hotel capacities that were forecasted by the Ministry of Tourism for these periods). The number of employees per room of each hotel category was multiplied by the average room capacity given in the previous chapter. The resulting number of employees per hotel was then multiplied by the number of forecasted hotels of each category. This results in the total number of needed qualified specialists in each hotel category. The needed number of employees per room was assessed relatively high for the year 2006, as qualified specialists are not available for the time being in the needed quantity and quality and the productivity should hence be assessed at a lower level. For the years 2013 and 2020, the value “employee per room” was then successively reduced and adjusted to internationally usual benchmarks.

2006			
Category	Employees per room	Employees per Hotel	Total employees
5*	1,4	105	210
4*	1,1	99	2.574
3*	0,9	93	6.294
2*	0,6	25	2.922
TOTAL			12.000

2013			
Category	Employees per room	Employees per Hotel	Total employees
5*	1,0	75	2.480
4*	0,8	72	8.000
3*	0,6	60	6.000
2*	0,3	14	790
TOTAL			17.270

2020			
Category	Employees per room	Employees per Hotel	Total employees
5*	0,8	60	4.020
4*	0,6	54	12.000
3*	0,4	40	8.000
2*	0,2	10	1.100
TOTAL			25.120

Forecast of the Need for Qualified Employees in the Hotel and Catering Sector (Source: ghh consult, according to the Tourist Accommodation Strategy, Ministry of Tourism of the Republic of Montenegro, 2006)

If these numbers are compared to the total number of full-time jobs in the tourism sector of Montenegro, the plausibility can be supported: according to WTTC, for the time being there are in total 14,500 full-time jobs in the tourism sector; a growth up to 24,500 is forecasted by 2016.

The time framework for the HRD strategy for the total tourism sector in Montenegro is taken for a period of 10 years. The following forecasts relating to the need for qualified specialists in various areas of the tourism sector thus refer to the period from 2006 to 2016.

Hereinafter we demonstrate detailed job distribution plans for each hotel category (differentiated according to the job descriptions and reference levels in which the need for qualified specialists is quantified). The reference levels have been taken from the

Perspectives Paper – National Vocational Qualifications, as the presentation can be considered to be plausible and suitable for the tourism sector. The “Perspectives Paper” thus serves as an orientation basis, although it may not be understood as a general valid criteria. The need for qualified specialists is given for one hotel each, where the basis is represented by two room capacities per hotel category as examples. A basis for the presentation are the job descriptions defined by WTO; however, also additional areas and thus job descriptions are given (Spa/Wellness, Events/Animation) that take into account the future diversification of the hotel sector in Montenegro. For the year 2006, the appropriate planned need – on the basis of existing hotel capacities - is indicated, where the present number of specialists in the Montenegrin hotel sector does not correspond to the need neither by quantity nor by quality

HOTEL INDUSTRY	150 rooms		45 rooms	
Category 1-2 stars	Level	Number	Level	Number
Administration				
Manager	VI	1	VI	1
Assistant Manager (Rooms Division)	V – VI		V – VI	
Marketing-Sales	V	1	V	
Food + Beverage Manager	V – VI		V – VI	
Chief Account	VI	1	VI	1
Chief controller	VI		VI	
IT administrator	V – VI		V – VI	
Assistant Accountant	III – IV	1	III – IV	
Secretary	III	1	III	1
Trainee	III		III	
SUB-TOTAL		5		3
Reception/Front Office				
Front office Manager	V – VI	1	V – VI	1
Receptionist	IV	4	IV	2
Assistant Receptionist	III	1	III	
reservation Clerk	IV		IV	
Night - Auditor	IV – V		IV – V	
Cashier	IV		IV	
Switchboard Operator	III		III	
Head Porter	III		III	
Bell – Boy Captain (luggage + Cars)	I – III		I – III	
Porter – Bell-Boys	I	4	I	2
Chief Security	I – III	1	I – III	
Security – Guard	I		I	
Trainee				
SUB-TOTAL		11		5
Housekeeping & Laundry				
Executive Housekeeper	III – IV	1	III – IV	
Assistant Housekeeper	III	1	III	1
Room Maid	I – III	7	I – III	2
Head Linen keeper	III		III	
Head of Laundry Service	III		III	
Laundry Worker	I		I	
Cleaner for public areas	I	3	I	1
SUB-TOTAL		12		4
Restaurant and Bar				
Restaurant Manager	V – VI		V – VI	
Head Water	III – IV	1	III – IV	
Assistant Head Water	III	1	III	1
Welcome Hostess	III		III	
Waiter	I – III	7	I – III	2
Assistant Waiter	II		II	
Chief Bar Tender	III – IV		III – IV	
Barman	III	2	III	1
Assistant Barman – Server	II	3	II	
Cashier	II		II	

Trainee
SUB-TOTAL

14

4

Category with 1 or 2 stars continued

HOTEL INDUSTRY

Category 1-2 stars

Maintenance

Building Maintenance Engineer
Maintenance – Man
Gardener
Cleaner

150 rooms

Level Number

VI 1
III – V 1
II
I 1
3

45 rooms

Level Number

VI
III – V 1
II
I 1
1

SUB – TOTAL

SPA – POOLS – SAUNA – WELLNESS

Wellness and Spa Manager

Fitness trainer

beautician

Masseur

Physiotherapist

V – VI
III
III – IV
III – IV
III – IV
nema

V – VI
III
III – IV
III – IV
III – IV
nema

Events – Animation – Children - Sports

Chief Animation

Animation Host / Hostess

Stage Decorater

Kids Club Manager

Sport Trainer

Water Sport Instructor

Life Guard – Pool attendant

V – VI
III
III
III
III
III
I – II
55

V – VI
III
III
III
III
III
I – II
21

TOTAL 1-2 Stars

55

21

Summary: category 1 – 2 stars

	150 rooms	45 rooms
Administration	5	3
Reception/Front office	11	5
Housekeeping	12	4
Restaurants + Bars	14	4
Kitchens	10	4
Maintenance	3	1
Spa	0	0
Animation + Sport	0	0
TOTAL	55	21

HOTEL INDUSTRY

Category 3 stars

Administration

	250 rooms			100 rooms	
	Level	Number		Level	Number
Manager	VI	1		VI	1
Assistant Manager (Rooms Division)	V – VI			V – VI	
Marketing-Executive	V	1			
Food + Beverage Manager	V – VI	1		V – VI	1
Chief Account	VI	1		VI	1
Chief controller	VI			VI	
IT administrator	V – VI	1		V – VI	
Assistant Accountant	III – IV	2		III – IV	1
Store - Keeper	III	1		III	
Secretary	III	1		III	1
Trainee					
SUB-TOTAL		9			5

Reception/Front Office

Front office Manager	V – VI	1		V – VI	1
Receptionist	IV	5		IV	4
Assistant Receptionist	III	2		III	1
Reservation Clerk	IV	1		IV	
Night - Auditor	IV – V	1		IV – V	1
Cashier	IV	1		IV	1
Switchboard Operator	III	1		III	
Head Porter	III	1		III	
Bell – Boy Captain (luggage + Cars)	I – III			I – III	
Porter – Bell-Boys	I	5		I	3
Chief Security	I – III	1		I – III	1
Security – Guard	I	4		I	2
Trainee		1			
SUB-TOTAL		24			14

Housekeeping & Laundry

Executive Housekeeper	III – IV	1		III – IV	1
Assistant Housekeeper	III	2		III	1
Room Maid	I – III	14		I – III	6
Head Linen keeper	III	1		III	1
Head of Laundry Service	III	1		III	1
Laundry Worker	I	3		I	2
Cleaner for public areas	I	3		I	1
SUB-TOTAL		24			13

Restaurant and Bar

Restaurant Manager	V – VI	1		V – VI	
Head Water	III – IV	2		III – IV	1
Assistant Head Water	III	2		III	2
Welcome Hostess	III	1		III	
Waiter	I – III	10		I – III	5
Assistant Waiter	II	2		II	1
Chief Bar Tender	III – IV	1		III – IV	1
Barman	III	3		III	1
Assistant Barman – Server	II	6		II	3
Cashier	II	2		II	
Trainee		1			1
SUB-TOTAL		31			15

Kitchen

Executive Chief (Head-Chef)	V – VI	1		V – VI	1
Assistant Chief (Soupe-Chef)	V	1		V	1
Cook (Saucier, Rotisserie, Gardemanger)	III – V	7		III – V	3
Cook Assistant	I – III	3		I – III	2
Chief Stewarding	II	1		II	
Steward – Dish – Washer	I	6		I	3
Pot – Washer	I	2		I	1
Trainee		1			
SUB-TOTAL		22			11

Category with 3 stars continued

HOTEL INDUSTRY	250 rooms			100 rooms	
	Level	Number		Level	Number
Category 3 stars					
Maintenance					
Building Maintenance Engineer	VI	1		VI	1
Maintenance – Man	III – V	2		III – V	1
Gardener	II	1		II	
Cleaner	I	1		I	
SUB – TOTAL		5			2
SPA – POOLS – SAUNA – WELLNESS					nema
Wellness and Spa Manager	V – VI			V – VI	
Fitness trainer	III	1		III	
Beautician	III – IV			III – IV	
Masseur	III – IV	2		III – IV	
Physiotherapist	III – IV	1		III – IV	
SUB - TOTAL		4			
Events – Animation – Children - Sports					nema
Chief Animation	V – VI	1		V – VI	
Animation Host / Hostess	III	4		III	
Stage Decorater	III			III	
Kids Club Manager	III	1		III	
Sport Trainer	III	2		III	
Water Sport Instructor	III	1		III	
Life Guard – Pool attendant	I – II	3		I – II	
SUB – TOTAL		12			
TOTAL 3 Stars		131			60

Summary: Category 3 stars

	250 rooms	100 rooms
Administration	9	5
Front office	24	14
Housekeeping	24	13
Restaurants + Bars	31	15
Kitchens	22	11
Maintenance	5	2
Spa	4	---
Animation + Sport	12	---
TOTAL	131	60

HOTEL INDUSTRY

Category 4 stars

	250 rooms			90 rooms	
Administration	Level	Number		Level	Number
General Manager	VI – VII	1		VI – VII	1

Assistant Manager (Rooms Division)	V – VI	1	V – VI	1
Marketing-Manager	VI – VII	1	VI – VII	1
Food + Beverage Manager	V – VI	1	V – VI	1
Chief Account	VI	1	VI	1
Chief controller	VI	1	VI	1
IT administrator	V – VI	1	V – VI	1
Assistant Accountant	III – IV	2	III – IV	1
Store - Keeper	III	1	III	1
Secretary	III	3	III	1
Trainee		2		1
SUB-TOTAL		15		10
Reception/Front Office				
Front office Manager	V – VI	1	V – VI	1
Receptionist	IV	6	IV	3
Assistant Receptionist	III	2	III	1
Reservation Clerk	IV	2	IV	1
Night - Auditor	IV – V	2	IV – V	1
Cashier	IV	2	IV	1
Switchboard Operator	III	2	III	1
Head Porter	III	1	III	1
Bell – Boy Captain (luggage + Cars)	I – III	1	I – III	1
Porter – Bell-Boys	I	10	I	5
Chief Security	I – III	1	I – III	1
Security – Guard	I	5	I	2
Trainee		1		1
SUB-TOTAL		36		19
Housekeeping & Laundry				
Executive Housekeeper	III – IV	1	III – IV	1
Assistant Housekeeper	III	3	III	1
Room Maid	I – III	16	I – III	7
Head Linen keeper	III	1	III	1
Head of Laundry Service	III	1	III	1
Laundry Worker	I	4	I	2
Cleaner for public areas	I	6	I	2
SUB-TOTAL		32		15
Restaurant and Bar				
Restaurant Manager	V – VI	1	V – VI	1
Head Water	III – IV	3	III – IV	1
Assistant Head Water	III	2	III	1
Welcome Hostess	III	2	III	6
Waiter	I – III	12	I – III	2
Assistant Waiter	II	4	II	1
Chief Bar Tender	III – IV	1	III – IV	2
Barman	III	4	III	3
Assistant Barman – Server	II	8	II	1
Cashier	II	3	II	1
Trainee		2		1
SUB-TOTAL		42		19
Kitchen				
Executive Chief (Head-Chef)	V – VI	1	V – VI	1
Assistant Chief (Soupe-Chef)	V	2	V	1
Cook (Saucier, Rotisserie, Gardemanger)	III – V	10	III – V	5
Cook Assistant	I – III	6	I – III	2
Chief Stewarding	II	1	II	1
Steward – Dish – Washer	I	8	I	3
Pot – Washer	I	2	I	1
Trainee		2		1
SUB-TOTAL		32		15

Category with 4 stars continued

HOTEL INDUSTRY

250 rooms

90 rooms

Category 4 stars

Level

Number

Level

Number

Maintenance

Building Maintenance Engineer	VI	1	VI	1
Maintenance – Man	III – V	4	III – V	2
Gardener	II	2	II	1
Cleaner	I	3	I	1
SUB – TOTAL		10		5
SPA – POOLS – SAUNA – WELLNESS				
Wellness and Spa Manager	V – VI	1	V – VI	1
Fitness trainer	III	2	III	1
Beautician	III – IV	4	III – IV	2
Masseur	III – IV	3	III – IV	2
Physiotherapist	III – IV	2	III – IV	1
SUB - TOTAL		12		7
Events – Animation – Children - Sports				
Chief Animation	V – VI	1	V – VI	1
Animation Host / Hostess	III	10	III	5
Stage Decorater	III	2	III	1
Kids Club Manager	III	2	III	1
Sport Trainer	III	4	III	2
Water Sport Instructor	III	2	III	1
Life Guard – Pool attendant	I – II	4	I – II	2
SUB – TOTAL		25		13
TOTAL 4 Stars		203		102

Summary: Category 4 stars

	250 rooms	90 rooms
Administration	14	9
Front office	36	19
Housekeeping	32	15
Restaurants + Bars	42	19
Kitchens	32	15
Maintenance	10	5
Spa	12	7
Animation + Sport	25	13
TOTAL	203	102

HOTEL INDUSTRY

Category 5 stars

	150 rooms		75 rooms	
	Level	Number	Level	Number
Administration				
General Manager	VI – VII	1	VI – VII	1
Assistant Manager (Rooms Division)	V – VI	1	V – VI	1
Marketing-Manager	VI – VII	1	VI – VII	1
Food + Beverage Manager	V – VI	1	V – VI	1
Chief Account	VI	1	VI	1
Chief controller	VI	1	VI	1
IT administrator	V – VI	1	V – VI	1
Assistant Accountant	III – IV	1	III – IV	1
Store - Keeper	III	1	III	1
Secretary	III	2	III	1
Trainee		1		1
SUB-TOTAL		12		9
Reception/Front Office				
Front office Manager	V – VI	1	V – VI	1

Receptionist	IV	4	IV	3
Assistant Receptionist	III	2	III	1
Reservation Clerk	IV	2	IV	1
Night - Auditor	IV - V	2	IV - V	1
Cashier	IV	2	IV	1
Switchboard Operator	III	2	III	1
Head Porter	III	1	III	1
Bell - Boy Captain (luggage + Cars)	I - III	1	I - III	1
Porter - Bell-Boys	I	7	I	5
Chief Security	I - III	1	I - III	1
Security - Guard	I	2 - 5	I	2
Trainee		1		
SUB-TOTAL		30		18
Housekeeping & Laundry				
Executive Housekeeper	III - IV	1	III - IV	1
Assistant Housekeeper	III	2	III	1
Room Maid	I - III	12	I - III	6
Head Linen keeper	III	1	III	1
Head of Laundry Service	III	1	III	1
Laundry Worker	I	4	I	2
Cleaner for public areas	I	4	I	2
SUB-TOTAL		25		14
Restaurant and Bar				
Restaurant Manager	V - VI	1	V - VI	1
Head Water	III - IV	1	III - IV	1
Assistant Head Water	III	2	III	1
Welcome Hostess	III	2	III	4
Waiter	I - III	6 - 10	I - III	2
Assistant Waiter	II	2 - 4	II	1
Chief Bar Tender	III - IV	1	III - IV	2
Barman	III	3	III	2
Assistant Barman - Server	II	5	II	1
Cashier	II	2	II	1
Trainee		2		1
SUB-TOTAL		27		16
Kitchen				
Executive Chief (Head-Chef)	V - VI	1	V - VI	1
Assistant Chief (Soupe-Chef)	V	2	V	1
Cook (Saucier, Rotisserie, Gardemanger)	III - V	7	III - V	3
Cook Assistant	I - III	4	I - III	2
Chief Stewarding	II	1	II	
Steward - Dish - Washer	I	6	I	3
Pot - Washer	I	2	I	1
Trainee		2		1
SUB-TOTAL		25		13

Category with 5 stars continued

HOTEL INDUSTRY

Category 5 stars

Maintenance

	150 rooms		75 rooms	
	Level	Number	Level	Number
Building Maintenance Engineer	VI	1	VI	1
Maintenance - Man	III - V	2	III - V	1
Gardener	II	1	II	1
Cleaner	I	2	I	1
SUB - TOTAL		6		4

SPA - POOLS - SAUNA - WELLNESS

Wellness and Spa Manager	V - VI	1	V - VI	
Fitness trainer	III	1	III	1
Beautician	III - IV	2	III - IV	1
Masseur	III - IV	3	III - IV	1
Physiotherapist	III - IV	2	III - IV	1
SUB - TOTAL		9		4

Events - Animation - Children - Sports

Chief Animation	V – VI	1		V – VI	1
Animation Host / Hostess	III	6		III	2
Stage Decorater	III	1		III	
Kids Club Manager	III	2		III	1
Sport Trainer	III	3		III	1
Water Sport Instructor	III	2		III	1
Life Guard – Pool attendant	I – II	2		I – II	1
SUB – TOTAL		17			7
TOTAL 5 Stars		151			85

Summary: Category 5 stars

	150 rooms	75 rooms
Administration	12	9
Front office	30	18
Housekeeping	25	14
Restaurants + Bars	27	16
Kitchens	25	13
Maintenance	6	4
Spa	9	4
Animation + Sport	17	7
TOTAL	151	85

A 2.2 Detailed Calculation of the Need for Qualified Specialists in the Area of Travel Agencies

The following review shows a plausible calculation of the current number of full-time jobs in the area of travel agencies, differentiated by tourist/travel agencies, tour operators and (independent) tourist guides.

	No. of firms	2006 Average number of employees	Total employees
Travel agencies	133	4	532
Tour-operators	57	14	798
Tourist guides	---	---	150
			1.480

Current Number of Qualified Employees in the Area of Travel Agencies (Source: Montenegro Tourism Association; Calculations ghh consult, 2006)

On the basis of the current situation in the area of travel agencies and the development forecasts of tourism development in Montenegro, one should proceed from the following future need for qualified specialists in this segment of the tourism sector:

	No. of firms	2011 Average number of employees	Total employees
Travel agencies	200	4	800
Tour-operators	80	14	1.120
Tourist guides	---	---	150
			2.070

	No. of firms	2016 Average number of employees	Total employees
Travel agencies	210	4	840
Tour-operators	100	14	1.400
Tourist guides	---	---	150
			2.390

Projection of the Number of Occupied Jobs for Qualified Personnel in the Area of Travel Agencies by 2016 (Source: Projections ghh)

A 2.3 Detailed Calculation of the Need for Qualified Specialists in Other Areas of the Tourism Sector

Segment	2006 Employees
Airlines	400
Transportation companies	500
Tourism Organizations	30
Authorities (ministry, etc.)	90
	1.020

Segment	2011 Employees
Airlines	600
Transportation companies	600
Tourism Organizations	60
Authorities (ministry, etc.)	120
	1.380

Segment	2016 Employees
Airlines	700
Transportation companies	700
Tourism Organizations	80
Authorities (ministry, etc.)	130
	1.610

Current and Future Forecasted Number of Jobs for Qualified Specialists in Other Segments of the Tourism Sector (Source: ghh consult, 2006)

Differentiated according to various levels, the need for qualified specialists for the area of transportation companies, airlines and airports can be presented as follows:

	2006		2011		2016	
	Level	Quantity	Level	Quantity	Level	Quantity
Transport, Airlines / Airport						
Management	VI-VII	75	VI-VII	100	VI-VII	120
Chief of Marketing	V-VI	20	V-VI	30	V-VI	40
Marketing and Promotion Specialist	V-VI	50	V-VI	70	V-VI	80
Public Relations Officer	V-VI	20	V-VI	25	V-VI	35
Controlling	IV-V	50	IV-V	70	IV-V	90
Accountant	IV	80	IV	120	IV	130
Ticketing Clerk	III-IV	150	III-IV	200	III-IV	250
Driver	III-IV	250	III-IV	300	III-IV	310
Assistant Driver / Transport	III	150	III	200	III	220
Pilot, Officer	VI-VII	25	VI-VII	35	VI-VII	50
Flight attendant	IV-V	30	IV-V	50	IV-V	75
Total		900		1.200		1.400

Need for Qualified Specialists – Differentiated by Levels – in the Area of Transportation, Airlines, Airports from 2006 to 2016 (Source: ghh consult, 2006)

A 3 Perspectives Paper - National Vocational Qualifications - Draft Version of Description Levels

Level I

- Basic understanding of jobs within a limited area of work is necessary; knowledge for understanding working tasks is minimal; the focus is on obtaining skills and habits.
- The holder carries out the simplest, basic jobs. The type of job rarely changes (manual processing of materials, work with manual tools).

- Jobs are completely predictable, working situations are structured in advance; there are no decisions to be made about the process throughout the work.
- Working instructions are given orally.
- Task execution is supervised directly.

Level II

- Individuals who did not complete elementary education should be given the opportunity to become functionally literate while they are obtaining the qualification level.
- Basic general and vocational knowledge is necessary; it is functional and used practically.
- Tasks are simple, repetitive and carried out on simple machines; choose and work with simple tools.
- Working instructions are detailed and are given both orally and in written form.
- Tasks are defined in advance; procedures and working sequences are defined. Problem solving is limited to basic, familiar procedures.
- Responsibility and independent decision-making about working processes are limited to simple and familiar contexts.
- There is no responsibility for the work of others or for dealing with the organization of the work.

Level III

- The level of general and vocational knowledge is sufficient to support decision-making and solving problems about new situations. It requires a higher level of understanding of basic working processes.
- The holder possesses and applies knowledge about processes, tools, materials, machines, equipment and technology in his/her professional area.
- Relatively complex jobs on different machines and devices in production and in the service sector; while working on these the choice is to be made and work with different tools and materials is to be executed.
- Jobs are not always defined in advance; working instructions are not detailed.
- He/she decides on the process; he/she solves basic problems in work.

- Organizes small teams of workers. He/she is responsible for their routine work; controls his/her own work and that of the team.

Level IV

- Education and training should provide the complete practical and theoretical knowledge in the specific professional area.
- Practical skills are developed based on an understanding and the acquisition of basic theoretical principals of the occupation.
- Varied, more demanding, non-standard working tasks. While working he/she is managing new and non-typical situations on a range of machines and using different tools.
- Problem identification and problem-solving while working, including the integration of information and cooperation with others.
- Independence in work; decisions are made within previously defined responsibilities; including predictions of consequences about certain professional decisions and actions.
- Organization of own tasks at the working place; organization of team work and responsibility for their work; evaluation and control of his/her own work as well as of the team's work.
- Decision-making on the progress of the process.
- Application of environmental and health protection regulations.

Level V

- Practical skills are based on specialized knowledge and an understanding of theoretical principles of the occupational area.
- Carries out a wide range of jobs, tasks, working techniques and technological procedures.
- Jobs are more complex, such as in direct production and in the preparation of the work, for tasks in services and administrative work. Different operations are undertaken using different working tools; works with machines and automatic devices. Tasks should be planned, carried out and controlled.
- The undertaking of tasks has significant influence on the productivity of others' work or the productivity of entire company.
- Tasks are defined in broadly, with no detailed instructions.
- Independence in decision-making while solving concrete problems in work and processes.

- Responsibility for others' work, preparation of work and organization of others' work.
- Quality assurance for the production process.
- Ensure the application of environmental and health protection regulations

Level VI

- Possession of systematic, theoretical knowledge in the appropriate professional area that enables a critical understanding of the work principles and methods.
 - Carries out numerous, different, complex and demanding tasks.
 - Jobs have to be planned, organized, undertaken, evaluated and controlled.
 - Production of working plans and technological procedures.
 - Monitoring of production processes.
 - Independence in decision- making in new and critical situations, introduction of change and improvement in planning and in the organization of the work processes.
 - Participation in team work, responsibility for larger work teams.
 - Responsibility for safety at work (for teams and individuals). Assurance and monitoring of health and environmental protection.
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