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**CONTEXT ANALYSIS**

**PART B: Report on Public Policies**

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## Report on Public Policies in Romania, Slovakia, Lithuania and the UK

The overall objective of the report is to make an overview of the policies to support tourism and mentoring in tourism. This activity has investigated existing public policies in terms of recognition of the mentor's professional profile in connection with European Qualification Frameworks. The survey had regional and national bases in order to facilitate ready comparisons between the different states of art of each partner country.

In order to collect data partners from all four countries have applied the research method called desk-research. The data were collected and outlined in order to be comparable and measurable within the partnership as far as it was possible; however, not all statistics were possible to collect in a similar way in all partner countries so that they could be compared.

The report is part of the context analysis that has two main aims:

- To give a general overview of the tourism industry including data on tourism enterprises and the description of tourism mentoring context, and the prevailing practices in the country;
- To take an informed decision regarding the definition of the object of study – the business function and the tourism entrepreneurship transition process at the country level;

To do so, partners have studied as many relevant documents, articles and websites as possible:

- Community and country policy documents relating to tourism policy and tourism companies policy, their education and training, skills, the EU agenda and others;
- National legislation and policy documents;
- Previous studies and evaluations of tourism enterprises and mentoring in tourism.

The report has been prepared within the frames of the project within the international project EU Tourism Mentoring which connects five partners across Europe - Slovakia, the United Kingdom, Romania and Lithuania. It focuses on mentoring within tourism sector. The project is implemented under the Lifelong Learning Programme, namely the Leonardo da Vinci - Transfer of Innovation and has been funded with support from the European Commission.

More information about the project is available on [www.eumentoring.com](http://www.eumentoring.com).

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## Country profile – Slovakia

The Slovak tourism industry is regulated by a few legal documents. The **Act on the Promotion of Tourism (Act no. 91/2010 Coll.)** is a systemic approach to addressing the tourism development in Slovakia. Its basic objective is mainly to regulate the issues concerning the establishment, legal status, financing and activities of the regional and district tourism organizations. Also to regulate the ways and forms of cooperation between the above-mentioned institutions, state authorities, self-government's authorities of towns and municipalities, business entities and associations in tourism, as well as the forms and system of its financial support.

The act focuses on:

- **Organisation structure of tourism** – to create framework and legal conditions for tourism development on the central, regional and local level on the principle of partnership between business entities and local self-government. In tourism operate large number of small entities whose actions has to be coordinated because of a common customer.
- **Competencies and responsibility in tourism** - to overcome the fragmentation of different legal regulations for the tourism sector which are addressed in a number of legal acts
- **Funding of tourism** – to develop a tool to support the development of tourism at national level. Funds invested in the tourism sector are recovered more progressively than in any other sector of the national economy.

The main benefit of this legal act was the motivation of tourism entities to ensure coordination of activities, i.e. destination management in regions and areas of tourism - a system component significantly absent in Slovak conditions. The act also aimed at pooling or association of the self-governing institutions and business entities in tourism, their networking with other actors as NGOs, experts etc. in the relevant territory.

Moreover, **subsidies to individual regional and district tourism organizations from the state budget** are foreseen by this Act. These financial resources can be used by the regional and district tourism organizations for the **advisory and consulting services** providing to their members. In accordance with the law, the Ministry of Transport, Construction and Regional Development of the Slovak Republic, responsible for the tourism sector, may provide also grants to the regional and district organizations. One of the grant-supported areas is the **educational activity** aimed at improving and developing destination management and tourism generally.

Since the act came into effect in December 2011, 38 tourism organizations have been established, 4 of them at the county level<sup>1</sup> and 34 at the district level<sup>2</sup>. 220 villages and towns, or Higher Territorial Units, 500 business entities and 50 others, joined the list and they were given subsidies in the total amount €3.3 million from the state budget in 2012 (increase to €3.4 million according to the proposed contracts in 2013).

The second document is the **Strategy of tourism development up to 2020** which aims to ensure continuity and conceptual approach in the tourism sector development in relation with the

<sup>1</sup> [Turizmus regiónu Bratislava](#), [Krajská organizácia cestovného ruchu Severovýchod Slovenska](#), [Žilinský turistický kraj](#), [Krajská organizácia cestovného ruchu Košický kraj](#)

<sup>2</sup> <http://www.telecom.gov.sk/index/index.php?ids=117872>

Programme Declaration of the Slovak Government for 2012 - 2016. This strategy conceptually follows the so called “New strategy of tourism development in Slovakia up to 2013” which was adopted in 2007. The **promotion of tourism by increasing the competitiveness through better exploitation of its potential together with the intention to straighten the regional disparities and imbalances, and creation of new jobs** is considered to be the strategic objective of this document. As partial objectives have been set the following areas:

- **to focus on innovations of existed tourism products based upon the new tourism trends demand,**
- to use the natural, cultural and historical potential of Slovakia more effectively and with the support of destinations where the stabilized demand of key markets has already existed (do not support destinations with unstable segments of the market which do not bring the sufficient synergic effect),
- to support destinations with sufficient natural, cultural and historical potential in less developed or underdeveloped regions with high unemployment rate and thus create new job opportunities.

## Tourism marketing

Tasks in the field of tourism at the national level are managed and implemented by Slovak Tourism Board (STB). In order to reach the objectives in marketing and promotion of tourism the most effectively, STB has established two strategic concepts as follow:

- short-term strategy concept (up to 2016) – STB will focus its activities to dynamically increase the number of visitors to Slovakia from the primary markets. This process will eventually lead to stabilisation and growth of overnight stays count related to the consumer spending of foreign visitors. In parallel, STB will focus its activities to the domestic population.
- long-term strategy concept (after 2016) – STB will focus to maintain maintaining its primary markets and attracting new secondary markets on which currently operates only through the intermediated marketing activities of international tourism organizations as well as within the Visegrad Group countries. Following this objective, it is necessary to increase the availability of Slovakia, especially in terms of air transport and the entry of new airlines on the market.

Tourism Development Strategy 2020 builds and develops the themes of strategic policy documents at the governmental level, implementation of which will influence the tourism development in the upcoming period.

Market actors are not enough concerned about the negative effects, which highlights the role of the state as the coordinator in promoting sustainable tourism development by the form of administrative measures, as well as the optimal conditions for the businesses.

The state must constantly motivate and encourage private and public sector for closer cooperation and finding the common solutions. Supporting of sustainable tourism development of however does not fall only under the competence of the state. An important role plays also the regional and local self-government with its tasks and competencies.

For the tourism development it is necessary to prepare quality graduates and moreover to enable and promote professional training of employees in tourism sector, in particular within life-long learning through further education. Importance of lifelong learning is in the fact that according to demographic prognosis, the number of students will be continually decreasing up to 95 000 of 15-18 year-old-students till the year 2019. This decline may have a significant impact on the lack of the secondary and higher education graduates.

It is necessary to mention that tourism businesses in Slovakia also lack a comprehensive quality management system, or systematic approach to quality management. Therefore, it is necessary to adopt a National quality system of services in tourism. Quality management system presumes the establishment of the framework, rules and order, which will result in satisfied customers and motivated employees.

The main weaknesses of tourism in Slovakia include:

- large **differences** in the quality of services in cities and regions of Slovakia - disparity of price/quality
- drain of **skilled workers** abroad ( unskilled labor in tourism services)
- insufficient **language and professional skills** of personnel
- quality of **transport infrastructure**, infrastructure still under construction
- non-existence of the unified **presentation of Slovakia abroad**, image of Slovakia as a tourist destination at a very low level
- missing big **foreign tour operators**

The role of the state in the tourism development is indisputable; although the whole sector is still significantly undercapitalized.

As for prediction of the proposed area and measure in the Strategy, there are two periods – up to 2016 and later one up to 2020. The proposed strategy is based upon the assumption that tourism will contribute 2.8% to GDP by 2016 (currently 2.45%) and 3.2% by 2020.

**Also based upon the proposed strategy, in order to ensure and most of all to increase the competitiveness of the tourism sector in Slovakia, it is necessary to focus on the better use of offered potential and capacity from the short-term point of view and on the quality development from the long-term point of view.**

## Country profile – Romania

In Romania, the representative body at the Government structure the former Ministry of Transport and Tourism is the National Tourism Authority. This body is designing the National Strategy for tourism development, product development and tourism destinations, privatization and post-privatization strategy in tourism, drawn from the Minister Delegate for small and medium business and tourism<sup>3</sup>.

The National Authority for Tourism is the main body that elaborates legislation and assures implementation & authority control in order to be respected the legislation (as well as the Ministry of Regional Development).

There is a coherent legislation in the field mainly adapted and in line with EU policies and values, initiated, coordinated and implemented by ANT.

There is also a National Strategy set up in tourism sector till 2024. In Tourism sector, in Romania, there are, at the level of government, some politics measures and public policies stated in a law<sup>5</sup>.

Shortly, the main topics are:

- a. Increasing the incoming sector of tourism in Romania
- b. Offer diversification and increasing services` quality.

There is a package of Laws and decrees that regulate these public policies<sup>6</sup>. There are also preoccupations for promoting Romania as a touristic destination – main feature is ecotourism, beauty of the natural sites & keeping traditions. The wellness & Danube Delta are considered the main attractions, as well as the Carpathian Mountains and Black Sea region<sup>7</sup>.

The ANT has also identified and classified the touristic structures at the level of the entire territory of Romania<sup>8</sup>.

After the big political change Romania had in 1989 – 1990s, the VET schools which were mainly preparing tourism-oriented specialists, especially in HLTT sector, have almost disappeared – instead of it, there were Universities & other forms of learning courses which were mainly theoretical, lacking of the practical part and shortened a lot that the side-effects were not late to be seen: decreased interest in the quality of services, bad attitude regarding the consumer reaction & encouragement of non-professional staff to access these jobs, mainly based on the concept of the qualification on-the-way & through learning by doing. Unfortunately, the results were not late to be felt in the re-orientation of the Romanian tourists to the foreign market & destinations, in the total lack of interest of the foreign tourists in the Romanian destinations, too.

Thus, the investors and the professional staff working in tourism field took the initiative to set up professional organizations/associations that could support their activity & their economical interests:

<sup>3</sup> <http://turism.gov.ro/>

<sup>4</sup> <http://turism.gov.ro/dezvoltare-turistica/>

<sup>5</sup> [http://www.mt.ro/web14/documente/strategie/politici-programe/12\\_luni\\_turism.pdf](http://www.mt.ro/web14/documente/strategie/politici-programe/12_luni_turism.pdf)

<sup>6</sup> <http://turism.gov.ro/legislatie/>

<sup>7</sup> <http://turism.gov.ro/wp-content/uploads/2013/05/Brosura-GB-.pdf>

<sup>8</sup> <http://turism.gov.ro/informatii-publice/>

ANAT/NATA (National Association of the Travel Agencies) and FPTR (Federation of the Professionals in Hotels & Restaurants) which are the main private associations, at a national level and which are the most active regarding the general policy-making in the HLTT sector.

“In general, the tourism labor market is characterized by a low level of education. Tourism is a traditional, fragmentary, industry, dominated by small businesses and run by managers who do not actually have education or formal training in tourism. In Romania there is the view that a proper skilled generalist can be trained within the specific problems of touristic operations and is preferred to a highly skilled tourism expert. This approach from bottom to top cancels both innovation and leadership. Due to the fast change of tourism nature, there is a danger coming from the overtraining in detailed knowledge and skills. Human resources development and training programs are often implemented adhoc, with specific programs for different activities to prevent the most pressing needs in field industry.

There is a tendency to develop the trainings remediation initiatives complying with what usually happen, rather than proactive training initiatives, which anticipate the future needs of industry. The important work resources are not seen as an integrating part of tourism development. Our opinions are supported by the structures of skills levels tourism employees; due some studies made in the main European touristic countries the following have been established: approximately 40% of the entire tourism personnel is unskilled, almost 42% have general average training, 8% - specialty studies and only 10% - superior studies. Industry and education have to work together to promote tourism accessibility as an activity. Educational levels in schools – and in general – related to tourism, was low in the past and contributed to the bad image of tourism and its acceptance as an activity in general. If tourism education and training support a profitable tourism industry, where the key position of human resources development is well known, stronger partnerships will be achieved, as well as a better communication and a commune direction for education, training and quality products in tourism<sup>9</sup>.

Unfortunately there is no one specific strategy in supplying education forms of national system of education (which includes studies specific in tourism industry, starting from VET institutions to superior economical studies, at university degree), neither one mentoring system in the HLTT sector. There is no mentoring generally, the concept of this manner of sharing knowledge has become recently vehiculated, but none is really understanding what it means, how it is functioning and how it could be implemented.

<sup>9</sup> <http://feaa.ucv.ro/AUCSSE/0036v2-017.pdf>

## Country profile – Lithuania

Tourism sector in Lithuania is being regulated by the following legal acts: - The National Tourism Development Programme for 2007-2013; - the Law on Tourism; - the Regulations of the State Tourism Department at the Ministry of Economy.

The Lithuanian tourism industry can realize its fullest potential, but it must have a well-trained, highly-qualified work force. Yet, to achieve this goal, full alignment must be in place between the worker skill sets, industry demands, and the education and training being offered by the academic institutions.

The Law amending the Law on Vocational Education and Training (2007) sets forth a new form of organising apprenticeship vocational education and training – where training takes place at the workplace: enterprise, institution, organisation, farm, freelance teacher. Theoretical training can be performed at a vocational education and training institution or another school. Judging from the experience of other countries, advantages of apprenticeship are linked with lower training costs and work with modern technologies. To address the problem of quality practical training of graduates, it is necessary to encourage tourism enterprises to use opportunities for training employees according to their needs and at the same time to contribute to increasing of attractiveness of vocational education and training. In the long run this would have positive impact on the supply of employees.

Apart from the image, the availability of tourism and hospitality training is fairly good. Universities and colleges have started shaping this landscape by providing various programmes for tourism and hospitality sector. Currently, there are various programmes offered such as: Tourism management, Tourism and hotel administration, International tourism management, Sport and Tourism, etc. The main goal of the courses are to introduce students into the key issues of the tourism and hospitality management and to develop understanding of historical, natural, economic and social recreation and tourism factors affecting the development of tourism in Lithuania, Europe and the world, contemporary problems of tourism and recreation, basics of tourism and recreation system and the relationship of the theory and practice.

Still, as it is demonstrated the structure of providing tourism and hospitality programmes is much differentiated and the quality varies a lot. In some cases, it is surprising that relatively little attention is practical learning and real problem solving.

The list of the labour market informal training programmes includes the following: organization of rural recreational activities (rural tourism); professional development programme for accommodation establishment employees; catering for parties, etc.

According to the data of the first half of 2012, 122 unemployed were trained in tourism programmes. Within 90 days following completion of training programmes, about 70% of the unemployed become employed, so roughly the supply of the unemployed training for the sector per year should be about 170 persons. It is encouraging that so many graduates are joining the market.

Yet, through the course of background research and industry reviews, it became clear that the education institutions are simply not producing graduates with the specific qualifications to meet the needs of the tourism industry. Some of the principal reasons for their shortcomings include:

1. Curricula often not well-matched to needs of industry
2. Under-qualified professors
3. Lack of support

Regarding mentoring, Lithuania is one of a number of countries that doesn't have a definition on mentoring and in a broader meaning it is defined as providing student support at university especially for the disabled and the long-term unemployed who produce goods and services according to commercial principles. The former communist countries today see the establishment of social enterprises as a possibility to fill the vacuum that has been left after the state rapidly withdrew its responsibility of the social sector after 1989. Therefore, mentoring is rather gaining the interest as a form of social interaction, and is better understood as social mentoring that is based on volunteering. None of universities or vocational schools has mentoring programmes, even more related to tourism and hospitality sector so far.

To sum up, Lithuania may serve as an example of the restructuring process that the new EU Member States and some candidate countries currently undergo and of their political position towards social entrepreneurship, however mentoring remains a very new concept and haven't reached the potential as yet. In Lithuania, the state seems to have a rather narrow view of mentoring, which is an informal activity to support different target groups. This causes a lack of favourable legislations to promote mentoring within education system. Due to the weak links with the public, Lithuanian people lack awareness and understanding of the mentoring role in dealing with professional development.

## Country profile – United Kingdom

The UK government pledges to fund the most ambitious marketing campaign ever to attract visitors to the UK following 2012 and to improve the sector's productivity in order to become one of the top 5 most efficient and competitive visitor economies in the world.

With this as a background, the sector faces a number of significant challenges which may hamper its productivity and overall performance. Many of these are linked in to the current demographics of the sector workforce, the nature of employment and low levels of skills utilisation. If the sector is to realise its potential it needs to provide opportunities for staff to develop and take on the expanding number of senior level positions in the future. By adopting innovative approaches to workforce recruitment and development, the sector can take advantage of opportunities to maximise its potential for economic growth.

The machinery of government is such that the ministry responsible for Skills and Business gives support to the HLTT sector through Sector Skills Councils (People 1st, for the HLTT sector). This are empowered to collect and analyse data concerning the sector, such as the skills and business development needs, and to recommend actions to address them.

As a complication, the actions are addressed through other government ministries or departments, and allow funds to move towards the priority actions. Funds are primarily channelled through the Skills Funding Agency for qualifications, yet this action is not normally addressing the skills needs of employees who are seeking up-skilling and personal development – which is recognised as more likely to be attained through mentoring than completing a qualification at college.

Mentoring is practiced mostly informally by companies and organisations. There are a few formal programmes run within large corporate organisations, particularly hotels. Formal programmes are run mostly by public sector organisations wishing to improve skills within the sector. Commercial organisations regard mentoring as a 'good' thing but tend to privilege and promote traditional forms of training or coaching.

## Conclusions on PUBLIC POLICIES in Partners` countries

As far as we see, the policy makers at the National level of each EU country started to reconsider tourism as a priority policy and as a field of new development. Even though strategies focused on the development of the HLTT sector were identified in each country participating in the EU TM project, they seem to be rather vague and do not address the full range of issues associated with the development of the industry. The legislation in the field is mainly adapted and in line with EU policies and values, initiated, coordinated and implemented by national authorities. However, supporting of sustainable tourism development does not fall only under the competence of the state. The regional and local self-government with its tasks and competencies plays also an important role.

Furthermore, if the sector is to realise its potential it needs to provide opportunities for staff to develop. In Lithuania, Romania and Slovakia, there are no specific education strategies in tourism industry identified; with no mentoring system in the HLTT sector either. Generally, there is a reserved approach related to tourism training due to the fact that tourism specialist are imagined as hotel, catering, and tourism agencies workers, that do not require university education. Available trainings are mainly theoretical, human resources development and training programs are often implemented adhoc, with specific programs for different activities to prevent the most pressing needs in industry field.

According to demographic prognosis, the number of students will be continually decreasing which may have a significant impact on the lack of the secondary and higher education graduates. As it is necessary for tourism development to enable and promote professional training of employees, lifelong learning can be used as a tool for personal development of those capacities in the fields such as Business start-up and development, management (HR, operations), financial issues, acquisition of clients, PR and Marketing.

The HLTT sector can take advantage of opportunities to maximise its potential for economic growth by adopting innovative approaches to workforce recruitment and development. One of the effective tools of career development, management skills development, conflict resolution, improvement of soft skills, general personal/professional development is mentoring.

However, as in every other profession it is very important for a mentor to be educated and to have obtained specialization in the field approached for mentoring. Within the EU, it is only the UK that has EQF-referenced qualifications that progress candidates towards a national industry standard of competence. There were no European Qualification frameworks identified in Lithuania, Slovakia and Romania either, that would recognise the mentor's professional profile and it is very difficult to find some training programmes for mentors in HLTT sector. Most learning opportunities can be identified in the UK where courses are on offer as part of university degree programmes, at Further Education colleges, and through private training providers.