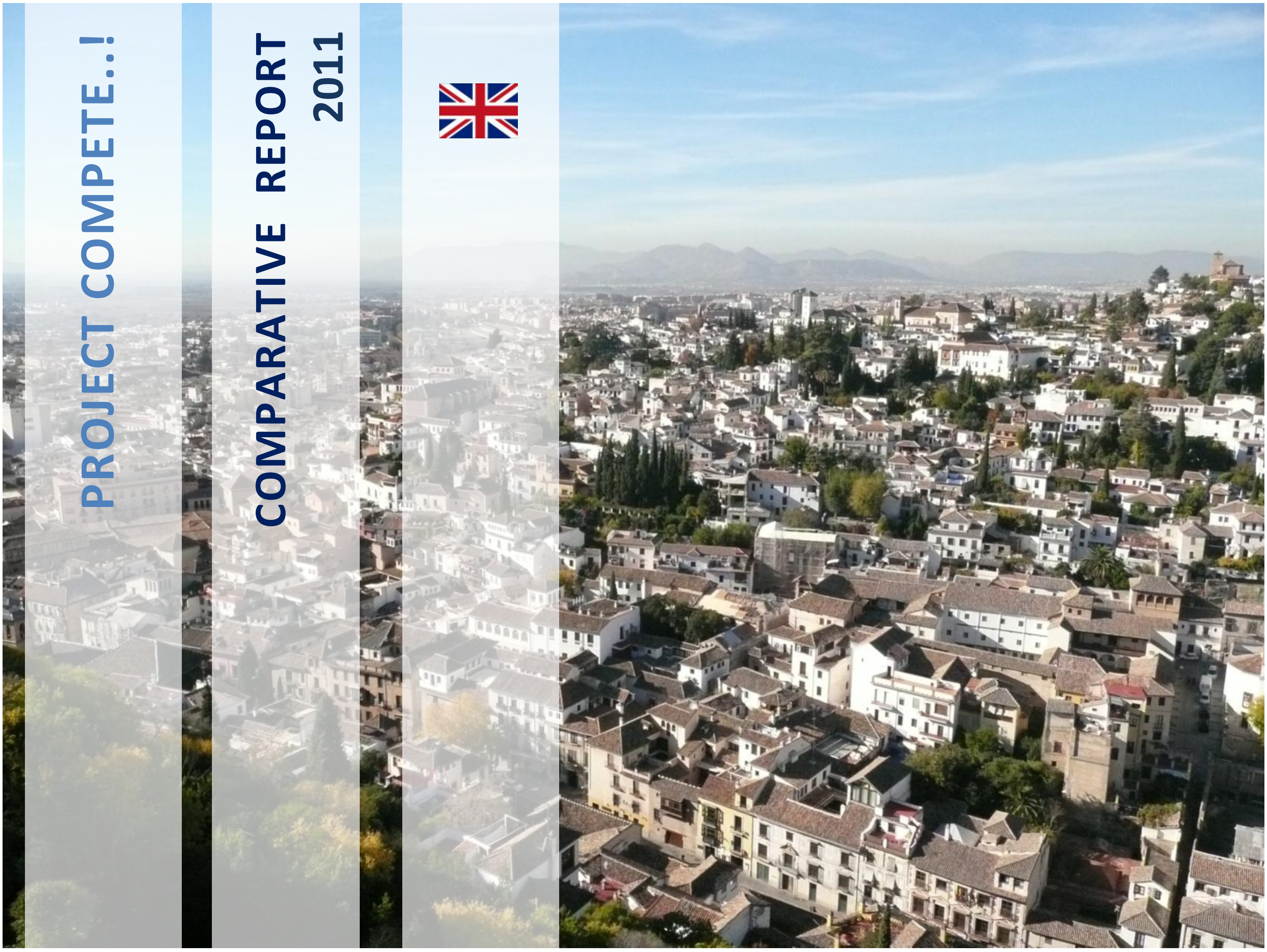

IN-DEPTH ANALYSIS OF THE NEEDS OF STRATEGIC COMPETENCE MANAGEMENT AND IN TOURSIM SECTOR - OVERWIEW OF THE SITUATION IN PARTNERS´COUNTRIES

EUROPEAN MODEL OF STRATEGIC COMPETENCES MANAGEMENT IN SMALL AND MEDIUM ENTERPRISES IN TOURISM SECTOR

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INTRODUCTION

The present document has been elaborated as one of outputs of the Project titled the "European Model of Strategic Competence Management in small and medium Enterprises in Tourism Sector", with the acronym of the project being "COMPETE..!". The Project is realized in the framework of the Lifelong Learning Programme Leonardo da Vinci, a scheme of Multilateral Projects/Transfer of Innovations. The Transfer of Innovations Projects are focused on the transfer (adaptation and incorporation) of innovation contents or outputs from previous projects of the Leonardo da Vinci programme or other innovative projects into public and/or private systems of a specialized preparation at the national, local, regional or sector level. The projects are aimed at enhancing the quality of the European system of specialized learning and preparation. The Transfer of Innovation Project must be based on output(s) / innovation(s) of another Leonardo da Vinci project or other innovative projects, which is the Polish Product titled the "Model of Strategic Competence Management" in case of the COMPETE..! Project.

The document is designed primarily for the Project team audience as a substantiating material for the development of subsequent activities within the Project in the sphere of transfer and adaptation of the given innovative product, and secondary it is also intended for professional and wide public as a source of aggregate up-to-date information from the HORECA sector. Mapping of the present situation in the tourism industry, particularly in the HORECA sector (catering and accommodation) within the European Union, based on a detailed study of the situation in individual partner countries and based on various publically available resources dealing with given problems, can be considered the main objective. At the same time, our interest has been focused on elucidation of the question "What problems are being coped with by entrepreneurs in the given sector most frequently" and on the development of a supportive material for ensuring the most effective way of transfer of the innovation.

In principle, the given study consists of three parts – outputs of the secondary research performed in the first six months of 2011, the questionnaire survey as a unique primary research which was complementarily supplemented using outputs of "Focus Groups" conducted with HORECA sector specialists, and the final part which provides particular recommendations regarding adaptation and transfer of the product. The first part titled the "**Desk Research – Analysis of Current State of Affairs"** provides – as evident from its title – an analysis of the situation under which the tourism industry operates at present. It is based on the information processed by individual partners from countries participating in the Project (Bulgaria, the Czech Republic, Italy, Poland and Spain) in "National Reports" together with other current resources of the information available (i.e. economic and statistic yearbooks, scientific articles, scientific/technical literature and research). The second part titled the "**Evaluation of the Questionnaire Survey"** represents a description of the unique primary research conducted and the questionnaire survey within the target group of the Project. The questionnaire survey and evaluation was carried out only for this Project in an effort to obtain valid information from the HORECA sector regarding actual needs of small and medium-sized enterprises directly from the point of view of the target group. The last part titled "**Conclusions and Recommendations for the Transfer"** summarizes all findings into several essential conclusions and recommendations which must be taken into account on the transfer and adaptation of the product being transferred.

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DESK RESEARCH - ANALYSIS OF CURRENT STATE OF AFFAIRS

In this introductory part, the document provides a description and analysis of the present state of the tourism sector on the basis of research carried out in individual partner countries on the one hand side, and on the other hand side on the basis of a comparative analysis of publically available specialized resources. The outcome should give an idea of the present state and trends within the whole European Union.

The travel business or the tourism can be understood as a sum of transient stays of persons (tourists) in target areas (destinations) and a sum of services aimed at organizing and supporting the travelling activities and stays. Tourism forms an important part of the economy, particularly in some countries. And according to the World Tourism Organization, UNWTO, the international tourism alone forms about 25 to 30% of all world services and employs more than 100 million persons. In 2010, a total of 940 million persons travelled abroad and the turnover of 693 milliard euro was achieved.[1] According to the UNWTO top ten classification six European countries were among the most visited countries of the world, and namely France (1st position, 76.8 million visitors); Spain (4th position, 52.7 million visitors); Italy (5th position, 43.6 million visitors); the United Kingdom (6th position, 28.1 million visitors); Turkey (7th position, 27.0 million visitors), and Germany (8th position, 26.9 million visitors). Apart from the already above-mentioned partner countries ranked in the classification, the current visiting rate (2010) in other partners is as follows: Bulgaria – 6.2 million visitors, the Czech Republic - 6.3 million visitors, and Poland - 10.1 million visitors. At the same time, the HORECA sector provides employment to 9 million[2] people all over the European Union, which represents 4.2% of all economically active people. These facts and data suggest the economic importance of these issues within the European context.

Further on, we will try to describe the most interesting and the most typical features of the HORECA sector and the sector of accommodation services for tourism in relationship to the entrepreneurial environment, to economic parameters and, at the same time, to human resources which are of the utmost importance to us from the point of the Project.

AGE STRUCTURE OF EMPLOYEES

Problems associated with an analysis of the age structure of HORECA sector employees are very interesting. The sector of hotels and restaurants offers numerous jobs especially for the **young labor force**. Proceeding from latest statistic data[3], 48% of people employed in hotels and restaurants and 43% of those employed in touristic accommodation services are younger than 35 years. The two above mentioned sectors possess a much younger age profile than the rest of the EU labor market where

[1] World Tourism Organization, UNWTO, „World Tourism Barometer”, June 2011
[2] EUROSTAT, „EU Labour Force Survey“, 2007
[3] EUROSTAT, "Statistics on Tourism", 2010

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only one worker out of three is younger than 35 years. These aggregate data valid for the EU apply more or less also to the majority of member states. In the majority of these countries the share of the age group below 35 years is altogether 10 and more percent points above the average share of employment in the entire economy. Employees below 35 years of age account for more than one half of workers in the sector of touristic accommodation e.g. in Slovakia (58%), in the Netherlands (56%), Sweden (56%) or Norway (56%). In all these countries, the share is higher than the average for the whole economy by roughly 20 percent points. Data for partner countries are as follows and – as a matter of fact – they copy the given tendency (except for Spain mentioned further): Bulgaria – HORECA 47% (the total mean is 30%), the Czech Republic – HORECA 51% (the total mean is 35%), Italy – HORECA 43% (the total mean is 31%), Poland – HORECA 58% (the total mean is 39%).Cyprus is the only state of the European Union where the age profile of employees in accommodation facilities is higher. In this case, employees below 35 years of age account for only 28% of jobs in touristic accommodation capacities and 33% in HORECA sector, whereas the general share of this group in the total Cyprian economy accounts for 37%. Only in Greece and Spain, two countries with the very developed tourism, the age profile in the segment of touristic accommodation does not exhibit marked deviations from the situation in all the remaining economic sectors. If we look at the opposite side of the age structure spectrum, it is evident that working opportunities for workers aged 55 years and more are, on the contrary, limited more in this sector (11%) than in the total labor market (14%).

THE STRUCTURE OF EMPLOYEES ACCORDING TO GENDER AND THE TYPE OF EMPLOYMENT RELATIONSHIP

When analyzing the share of fulltime employment in this segment, it is evident that it does not differ substantially from the whole EU economy. In both cases four out of five persons work at a fulltime engagement. 72% of employed persons work fulltime in the sector of hotels and restaurants. However, data from individual countries show that the situation differs very much in various countries. Results are ranging from almost no part-time engagements in the touristic accommodation sector (e.g. in Bulgaria or Romania) up to 60% share of part-time engagements in the Netherlands. Results for remaining partner countries are situated – more or less – somewhere between these two counterpoints (the Czech Republic 7%, Italy 25%, Poland 13%, and Spain 18%). Generally, the values for this sector reflect the same fulltime/part-time distribution as in the whole economy. Countries with the total high share of part-time engagement such as e.g. the Netherlands and Denmark (44%), Norway (38%), Germany (32%) or Sweden (30%) exhibit the high share also in our segment. The labor market in these countries contains some 20 – 25% of part-time employees, which is more than the total average in the EU (18%). Our partner countries have a relatively balanced proportion of fulltime and part-time engagements, with Italy being the only country exhibiting a more marked disproportion in utilization of part-time engagements as compared with the overall mean in economy (HORECA 25%, overall mean of 14%), and partially Spain (HORECA 18%, the overall mean is 12%).

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The touristic accommodation sector is a **significant employer of women**. On the average 60% of the labor force in this sector is created by women in comparison with a 45% share of women employed in the whole EU economy. As for creation of job opportunities for women, the score of the touristic accommodation sector is even better than the overall HORECA sector where the employment of women amounts to 56%. From the data available it is evident that differences within the EU are relatively small, although slightly more marked than in the entire economy where the share of women employment does not deviate by more than several percent points from the EU average almost in all countries (45%). Conspicuous are the following countries: Romania (72%), Norway (71%), Poland (70%), Finland (70%), and Germany (69%) where the share of women employed in HORECA sector exceeds 2/3. On the opposite side are the member states such as Malta (38%) and Italy (49%) - the only states where women do not account for the above-half majority of jobs in the sector of accommodation for tourists. In this case, however, results are in correlation with the state as in the whole economy where these two countries also have the lowest involvement of women in their whole economy (the similar situation as in Greece for instance). For the sake of illustration, we are presenting data for the above mentioned partner countries: the Czech Republic (60% of women), Bulgaria (65% of women), and Spain (59% of women). As evident, the condition in these countries corresponds rather to the situation in Poland than in Italy.

If an analysis is made combining the distribution of fulltime and part-time jobs in relation to gender distribution, then it is evident that the share of women working fulltime is lower in HORECA sector (64%) than in the rest of the economy (68%)[4]. Men working in this sector fulltime amount to 81%, which is less than the overall average of the European Union for men (92%). Within the European Union, Holland exhibits the lowest number of fulltime employers in the sector of hotels and restaurants (40%), which is the usual practice in that country (the lowest number is also in the whole national economy). These are relatively interesting findings because rather a higher amount of flexible forms of work would be expected, including the application of part-time jobs, in the sector of hotels and restaurants as the sector affected considerably by the factor of seasonality.

EDUCATIONAL STRUCTURE IN THE SECTOR

The aforesaid data show that utilization of two social/demographic groups is typical for the sector studied by us, and namely: young people and women. The third group involved heavily in this sector includes **individuals with a lower education standard,** i.e. people who achieved a lower secondary education. Proceeding from the latest statistic data available, the higher secondary education is not accomplished by 36% of employees in the touristic sector, with the overall average on the labor market in the EU being merely 25%. Data available from individual EU member states nothing but confirm this fact. The largest deviation from the mean of the whole economy can be seen in the tourism industry in Switzerland where the share of people with low education amounts to more than a double value in relation to the share on the total labor market (36% vs. 16%). Other countries where this sector offers job opportunities primarily to less educated individuals are e.g. Germany, Sweden, Norway and Denmark. The only countries where it seems no marked difference exists

[4] EUROSTAT, „EU Labour Force Survey“, 2007

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are Portugal (71%), Cyprus (24%) and Hungary (14%). At the same time, not a very encouraging leading position in this statistics within the EU is held by Portugal through having the highest share of employees with the lowest standard of education. Considering the situation in individual partner countries, it is similar mainly in Italy (employees with the lowest HORECA education - 51% versus the mean in the whole economy - 39%) and in Spain (employees with the lowest HORECA education - 57% versus the mean in the whole economy - 44%). A comparison within the Czech Republic offers a relatively balanced result (HORECA 8% versus 6% in the whole economy). Interesting is the situation in Poland and Bulgaria where the mean is exactly the opposite in the lowest level of education achieved (Poland - HORECA 9% versus 10% in the whole economy, and Bulgaria - HORECA 10% only versus 15% in the whole economy). However, this fact does not disprove the above presented statement about the generally lower level of education being achieved in HORECA sector because the considerable disproportion has been nothing but shifted one level higher in this case (up to the medium level of the education achieved) – Poland HORECA 82% versus 68% the rest of economy resp. Bulgaria even 80% versus 60%. There is another interesting fact – and namely that in comparison with the rest of the economy – there is generally a by-far-lower representation of workers with the highest level of education achieved in HORECA sector.

The above mentioned findings are also in compliance with statistic data regarding utilization of information and communication technologies in enterprises. The statistic data show that the accommodation sector does not exhibit a high standard of competences in the sphere of ICT utilization in the majority of employees. Only 36% of employees use the computer for their everyday work in this sector as compared with almost every other one (49%) using it on the average in whole economy. Only the building industry is worse in this ICT-use parameter than HORECA in terms of sectors studied.[5]

STABILITY OF EMPLOYMENT

As already stated above, in terms of the share of fulltime/part-time engagement no significant differences are exhibited by the HORECA sector. Nevertheless, taking into account parameters such as the total duration of the employment relationship or the mean time of persistence of the worker at the same employer, the sector seems to be less stable in terms of an offer of jobs compared with the rest of the labor market. The share of workers employed for a definite period of time instead of an indefinite period of time is more than twice higher in our sector (30% of jobs are employment relationships for a definite period of time) compared to the whole economy (14%). In all the countries for which these data are available, the HORECA sector is not doing very well in this aspect. The highest differences between this sector and the whole economy are evident in Greece (59% of standing jobs as compared with 89% in the whole economy), Italy, Sweden and Bulgaria. This limitation of the job offer for an indefinite period of time can be logically associated with the seasonal nature of tourism. It is true that the above stated countries exhibit simultaneously largest differences in a number of persons employed in terms of quarters of the year having the highest resp. the lowest filling of touristic capacities.

[5] EUROSTAT, „Community Survey on ICT Usage and E-commerce in Enterprises “, 2007

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The average persistence of an employee with the same employer is another criterion of the employment stability. The data available suggest that staying of an employee with the same employer in the HORECA sector is much shorter than the mean in the whole economy where it is 121 months, i.e. more than 10 years. In HORECA sector the mean time is only 65 months, i.e. almost a half-value (for the sake of illustration, the values in partner countries are as follows: Bulgaria 51 months, Poland 61 months, Spain 64 months, Czech Republic 67 months, and Italy 71 months)[6]. On the whole, comparing values in HORECA sector with those of the rest of the economy, the mean period of time spent with one employer is less than half as compared with the whole economy e.g. in Greece and Sweden. On the other hand side, the lowest disproportion from the average is exhibited by Portugal and France.

Thanks to the above mentioned facts, **the high share of employment for the definitive period of time** and **the mean short period of staying with the same employer** can be considered other typical features of the HORECA sector.

THE FACTOR OF SEASONALITY

It is generally well known that the intensity of travelling and tourism differs a lot in the course of the whole year, i.e. the factor of seasonality is very strong here. The filling of capacities in accommodation facilities (expressed as a number of nights spent by tourists in the facility – tourist nights) is at least twice as high at high-season months in all EU member states as compared with the most peaceful month. It is clear that countries with a short touristic season will exhibit the highest seasonal differences in a number of tourist nights at the same time. Thus for instance in Greece and Croatia the number of nights spent by tourists in accommodation capacities is 13-time resp. 35-times higher in August than in January, i.e. out of the season. If the number of nights spent by tourists in an accommodation facility is divided into four quarters of the whole year, it is evident that the third quarter of the year (which is generally the highest one) exhibits a 2.5-multiple value of the first quarter (which is generally the lowest one). Considering the data of the whole European economy, the seasonal performance fluctuation is relatively a marginal matter, which – of course – does not mean the large seasonal deviations in various sectors are not hidden by means of the huge aggregation of data. In tourism industry the highest seasonal fluctuations can be traced in Greece and Croatia. In the two countries the employment scope in the high quarter of the year reaches doubled values of the weakest quarter and, at the same time, 30% to 35% higher than the annual average. The opposite end of the spectrum shows no significant seasonal differences in the sphere of employment in Denmark, the Netherlands and Norway. Nevertheless, the number of out-of-season nights spent by tourists in these three countries is only twice to three times higher than in the high season. The way of how to cope with this seasonality factor in HORECA sector undertaking is one of the most difficult problems to be managed by entrepreneurs

[6] EUROSTAT, „EU Labour Force Survey“, 2007

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in this sphere. Viewing these questions through the optic angle of countries which are the most interesting ones to us, i.e. the partner countries, it can be stated that the tourism sector in Bulgaria is being affected by the factor of seasonality probably most of all (3^{rd} quarter of the year amounts to a 5.5 multiple value of the 1^{st} quarter of the year), in Italy (3^{rd} quarter of the year amounts to a triple value of the 1^{st} quarter of the year). In Poland and Spain, the situation copies – more or less – the mean value of the whole EU-27 (3^{rd} quarter of the year is a 2.5 value of the 1^{st} one). The Czech Republic is more consolidated in this respect and fluctuation between the seasonality and the high season is under-average (the coefficient is represented by the numeral 2).

EMPLOYMENT

Measurement of a number of people employed in the tourism sector is relatively complicated. At present, only national non-harmonized data for some of member states are available. Available are also current data from partner organizations. According to them, numbers of workers operating in HORECA sector range from 114 thousand in Poland, thorough 240 thousand in the ČR and Bulgaria up to 1.246 thousand in Italy and 1.591 thousand in Spain. Once again, it is necessary to note that the data are without harmonized methodology of collection, and thus their confidentiality is limited in this respect.

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EVALUATION OF QUESTIONNAIRE SURVEY

The questionnaire survey in the framework of the Project was carried out in all partner countries involved in the Project in the period from April to May 2011. The questionnaire survey had been selected as a statistic method owing to the highest scope of suitability for the given case and purpose. When speaking about the purpose of ascertaining, it can be described as follows:

- Mapping of the current situation in the given sphere from the point of view of the target group,
- Detection of the most pressing problems bothering entrepreneurs in the tourism industry most of all, and, last but not least:
- Ascertaining opinions of persons responsible for the sphere of strategic management of competences in facilities of an accommodation resp. catering nature.

Prevailingly owners and managers of small and medium-sized HORECA sector companies were respondents within the survey.

For the sake of survey realization, a unique questionnaire had been developed; it was divided into several interconnected spheres of interest of ascertaining from the methodological point of view. The first series of questions was aimed at analyzing characteristic features of entities operating on the market in order to facilitate us to create subsequently the qualitative and quantitative profile of a typical representative. Based on the information and knowledge obtained like that it is then possible to make a better adjustment of the existing Model of Strategic Competence Management to be - so to say – client-tailored. Identification of the most pressing problems being currently coped with most frequently by the small and medium-sized HORECA sector companies is another interim objective of this sphere of questions. The second part of the questionnaire deals with elucidation of standpoints and opinions of the target group as regards competence issues of employees of selected professions in terms of their prioritization. Data found in this sphere are very important to us for the sake of further modeling and general set-up of parameters of the adapted product. The final part of questionnaires gathers data regarding attitudes of the target group to applicability of final outputs of the Project, on the one hand side, and ascertains their approach to problems of a regular evaluation of employees, to implementation of motivation systems of employees in firms and, last but not least, their attitude to issues of the lifelong education of employees.

The survey was carried out using a sample of at least 50 respondents in each partner country, with a particular selection of subjects being entrusted to the competence of specialists in individual partner organizations. Hence, the highest possible scope of representativeness of the sample was ensured as regards the general population. Unfortunately, a larger scope of the survey was not possible due to Project financing. Nevertheless, it can be stated that this was quite a legal way of how to select the sample of the statistic survey, and that results can be hence considered more than

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satisfactory and having a good reliability that is in a direct correlation to the overall scope of selection. Of course, in this context certain issues must be mentioned on ensuring a feedback when realizing the statistic survey, which were being managed especially thanks to efforts of surveyors and by means of personal/telephonic inquiries at respondents. Certain unwillingness of respondents to provide some information to third parties can be probably explained by keener and highly competitive conditions in this sector.

In order to validate the data obtained through the questionnaire survey, a decision was taken to realize moderated workshops of specialists in the tourism industry – the so called „Focus Groups“. The given meeting took place as a complement to the questionnaire survey in each partner country. Results of the survey were subject to a critical discussion by specialists and, thereafter, validated by them. Outputs of the meeting along with comments and perceptions of specialists have been incorporated into the text of this Report.

We think that here it is important to note that in some cases the data obtained in various partner countries in particular spheres are diametrically different, which is quite understandable for geographic, social/economic and, last but not least, cultural reasons. Nevertheless, on the whole, it may be stated that aggregated survey data, supported by outputs from Focus Groups conducted, offer a good idea of issues and, at the same time, ensure good-quality substantiation for the adjustment and transfer of the original product – i.e. the Model of Strategic Competence Management.

If the series of questions in the first part of questionnaires is subject to an analysis, it is possible to define quite convincingly common features typical, to a certain extent, for organizations active within the HORECA sector. The selection of organizations for the survey was entrusted to local partners in each country and they selected the sample in a way to be proportionally well-balanced as for the distribution of a number of responding companies prevailingly of an accommodation type (simply „hotels“) and those of a catering type (simply „restaurants“).

In terms of their size, they are micro-facilities in the majority of cases – according to the recommended European Commission Definition[7] they are facilities employing 10 workers at most and with an annual turnover not exceeding 2 million EUR (in our case with a turnover not exceeding 100 thousand EUR in the vast majority). In terms of their form, they are family businesses very frequently, followed by business firms or individually owned/operated entities.

[7] SME Definition: Commission Recommendation of 06 May 2003 (2003/361/EC)

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Important is the finding that, according to answers of respondents, employing of foreign workers in the HORECA sector enterprises is relatively rare. This information is in direct contradiction with the generally very-well-known fact that employing of a foreign working force, whether in a legal, semi-legal or even illegal way, is perhaps the most typical for this sector, probably following the building industry sector. It is estimated that a number of foreign workers employed in the HORECA sector in the European Union ranges between 6 – 14% of their overall number[8]. This finding – corrected by specialists – can be interpreted as a certain unwillingness of respondents to be open in their answers for the most various reasons which are senseless to speculate about. Only a relatively negligible number of respondents disclosed their employing foreign workers. From our point of view this finding is a sort of positive because in this case a higher interest of employers in a growth of competences of workers and in investments into their enhancement can be deduced partially. This construction reckons with a premise that the local working force is more stable and less apt to fluctuation, and thus it is more worthwhile to solve the adequacy of their competences and/or to invest into their development.

As for the stability of the working personnel, these issues are relatively balanced, when in our survey one part of subjects has almost no problems with the fluctuation (probably mainly small family enterprises), while the second part copes with occasional up to frequent or seasonal fluctuation of employees. We are convinced that this matter is of its high importance because the general proportion is valid here – the higher the fluctuation of employees, the lower the willingness of employers to invest anyhow into the development of human resources. The issues of a seasonal character, ever so typical for the sector of tourism as described above, are tightly connected with the stability of the working personnel. Many a time, it is very problematic for the management of companies to fit the stability of the working collective together with the need to balance their number based on a current situation and demand. In this context it is also important to draw attention to the fact that the fluctuation is not homogeneous in all professions. It is evident that very probably workers of some less qualified positions will be more apt to switch to other positions as compared with professions requiring a higher qualification, and thus being better paid.

The age structure of employees is typically rather lower, with the highest representation of the 20 – 30 year age interval and then the interval of 30 – 40 years. Almost one half (48%) of all employees working in the HORECA sector in the European Union is younger than 35 years.[9] In our survey, the age structure copies, in essence, the Gauss curve of a normal distribution and exhibits no significant anomalies. The fact the employees of the HORECA sector organizations are rather younger can be also interpreted through a presence of a high level of the factor of season (with a relative instability of the job following from it), through lower wages (a more frequent incidence of the „non-standard" form of remuneration within the grey economy), through the more

[8] Working safety in multicultural HORECA sector: http://osha.europa.eu/en/publications/forum/17_horeca
[9] EUROSTAT, "Tourism employment" - Statistics Explained (2011/7/5)

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demanding work in terms of time, and through other factors which are non-acceptable for workers of a higher age.

The sphere providing answers to questions regarding problems which are coped with by our respondents most frequently and solved by them on a day-to-day basis is another very important sphere of detection. By means of such findings, it is easier to define strategic objectives to be probably reached by the employers; and it is – besides others – an integral part of our further work on the Project. The problems being mentioned most frequently at first positions include the detection of a good-quality, responsible and adequately qualified working force and complications caused by its relatively frequent fluctuation. Another chapter encompasses problems of a complicated approach to ensuring financing, a high tax load, uneasiness to commence new projects owing to bureaucratic obstructions, the general drop of the segment and another spectrum of macro-environmental factors.

In this context, of course, it is necessary to realize that the present problems experienced by entrepreneurs active in the sector are being undoubtedly affected by the financial crisis inflicting a large part of European economy. Whether or not willing, there is still the reality that customers prefer to stay at home, not going out for a lunch or dinner or buy an expensive holiday. Also the highly competitive situation on the tourism market is a problem, as well as the high offer and low demand. Another of issues mentioned (e.g. in Spain) consists in an insufficient marketing promotion of regions to attract new tourists. In this problematic period, respondents would appreciate a higher support not only on the part of the central state administration but also municipalities. As evident, many of problems identified are relatively widely defined and are objectively of an external character. With problems such as „insufficient financial resources" it is hardly possible to alter the identification of weak-points in competences of employees by means of our product at first sight, nevertheless – on the other hand side – an assertive, authoritative manager equipped with good conversational skills may be much more successful on ensuring an operational credit than a colleague not availing of such competences.

The second segment of the questionnaires is no less important. It regards gathering information about desirable "strategic" competences of employees of five professions which had been selected as the most typical for the sector. They are the following professions: barman/waiter, receptionist, chambermaid, cook and manager. Respondents were selecting out of a list of 44 competences for each of the above professions, with the competences being the backbone of the original product, and they were allowed to identify at most 5 competences considered significant/essential in terms of essence of the given profession. Below find the list of all the competences used within the survey.

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Table 1: A list of competences of the Model of Strategic Competence Management

Artistry	Delegating	Listening	Risk taking
Assertiveness	External orientation	Loyalty	Self-awareness
Authority	Flexibility/adaptability	Negotiating	Self-development
Coaching	Goal orientation / Result orientation	Organizational awareness	Self-direction
Conflict management	Independence	People-oriented leadership	Stress management
Confronting / Feedback	Initiative	Perseverance / persistence	Tact / sensitive behavior
Conversational skills	Innovation focus	Planning and organizing	Tactical behavior / adaptability
Cooperation	Integrity	Precision / accuracy	Task-oriented leadership
Creativity / ingenuity	Judgment	Presenting	Verbal skills
Customer focus	Learning ability cognitive	Problem analysis	Vision
Decisiveness	Learning ability interactive	Progress control	Writing skills

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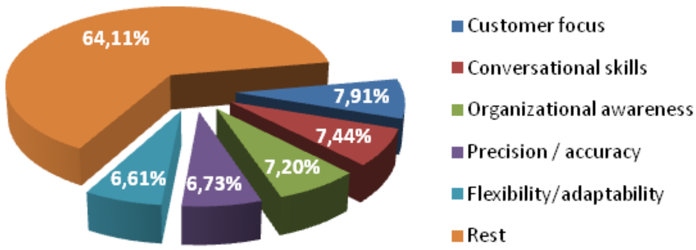
Barman/Waiter

The "Customer focus" i.e. the focus on the customer and his/her need" – as the most important competence required by owners and managers of HORECA sector organizations – seems to be highly logical and substantiated for the Barman/Waiter profession as well as the necessity of the "Conversational skills". The quality and scope of these desirable competences in the Barman/Waiter working position is very important for the employer because just these workers come in the tightest contact with customers and co-affect the satisfying or dissatisfying of client needs and expectations through their behavior and performance. The following competences were identified as further important ones: "Organizational awareness", "Precision /Accuracy" and "Flexibility/Adaptability" of employees to working conditions. The whole group of the five most frequently stated competences is of a relatively very close proportional size, i.e. they are of the same importance for respondents and, on the whole, they account for more than 1/3 of the total number of given frequencies. Out of competences occupying further positions it is possible to state the "Cooperation" at work, "Loyalty" and "Initiative". Of course, these competences can be also considered an important constituent of the portfolio of the general equipment for these professions.

Figure 1: Position "bartender / waiter" - a list of core competencies

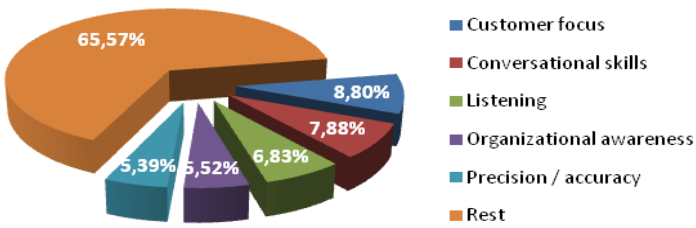


Receptionist

Analogously as in case of the Barman/Waiter, it is a job position that is very important for the HORECA facilities management due to a direct contact with the customer. The quality of and proficiency in services provided determines largely the level of the general client satisfaction or dissatisfaction.

The sector diagram exhibits a large similarity of results with those from the previously analyzed job position of Barman/Waiter. The following competences are considered crucial by respondents: "Customer focus", "Conversational skills", "Listening", "Organizational awareness" and "Precision/Accuracy" of the work performed. Besides the above mentioned competences, the list can be supplemented with other necessary skills and proficiencies such as e.g. "Flexibility/Adaptability" (which follows from demands

Figure 2: Position "Receptionist" - a list of core competencies



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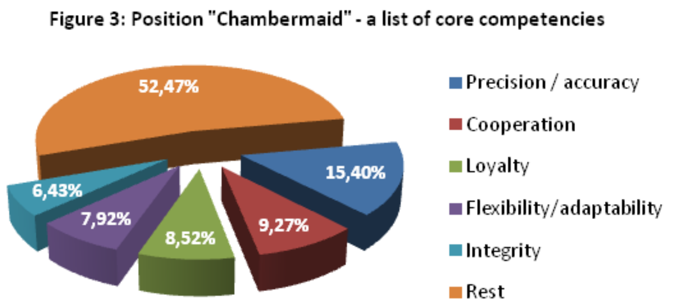
of the profession and its contents to a considerable extent). Furthermore, “Presenting”, “Confronting/Feedback” and “Cooperation” play their role, too.

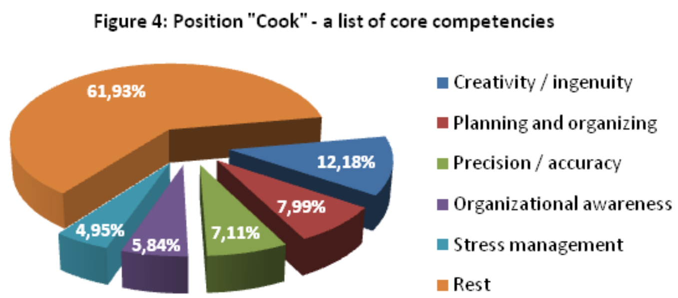
Chambermaid

It is quite clear from results that it is a less qualified job position which is not so demanding in terms of a spectrum of abilities and skills of the worker performing the given activities. The above mentioned can be deduced from the fact that the group of the five most frequently identified competences /necessary for a good performance of the work / account for almost 50% of all the mentioned. Respondents possess a clear idea of the job contents and they are in a relative harmony in identifying competences suitable for this position. They are ranked as follows: “Precision/Accuracy” at work, “Cooperation”, “Loyalty”, “Flexibility / Adaptability”, and generally the “Integrity” of the personality. The first competence in the order, i.e. the “Precision/Accuracy” dominates clearly as for the frequency of the identification and its share is almost 15.5%. It is evident that managers and owners of facilities prefer a worker with an ability to perform the work consciously, accurately and with due precision. Further competences worthwhile mentioning are mainly the following: “Customer focus”, “Self-direction” at work. The rest of competences identified was only marginal as compared with the above mentioned ones.



Cook

The „Cook” job position is crucial both for the primarily catering HORECA sector facilities and for organizations in which accommodation services are the main subject of activities, but which provide also catering – at the same time (e.g. hotel restaurants). The portfolio of competences for the job position of the cook that originated from results of the questionnaire survey is relatively understandable and we are convinced it reflects correctly the essence and job content of this position. The group of the five



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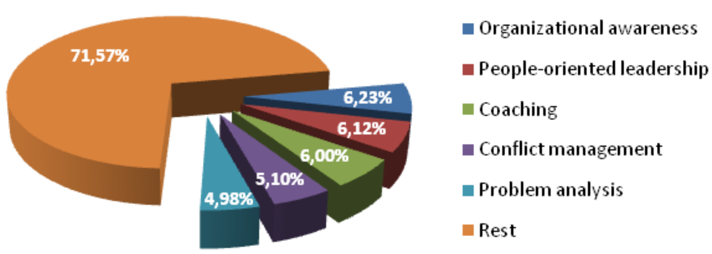
competences occurring most frequently includes “Creativity/Ingenuity” at the first position, which is decisively one of the very important criteria for evaluation of a gastronomic level of the facility. Furthermore, there are abilities and skills in the sphere of “Planning and Organizing” of work, “Precision/Accuracy” and an ability to work under a stress, i.e. the “Stress Management” competence. In this context, it is necessary to draw attention to the fact that there is a special category of a position of the “Chef” which approaches rather the managerial position in terms of its spectrum of necessary competences.

Manager

Contrast to the aforesaid job positions and their portfolios of the five most frequently identified competences, the managerial position in an accommodation and catering facility is clearly of a more complex character and is not so unequivocal. This fact is evident from Figure No. 5 when the group of the five most frequently identified desirable competences creates a proportionally smaller share in relation to the previous analyzed professions. Analogously shares of the group of five competences are relatively of the same size and hence respondents consider them relatively identically important. As for managerial skills, the highest importance is imposed upon “Organizational awareness” followed by “People-oriented leadership” and “Coaching” of people, upon “Conflict Management” and “Problem Analysis”. Owing to the balanced frequency of some other competences being identified, it would be an evident mistake not to present them. They are followed by such competences as “Authority” “Assertiveness”, “Judgment”, then Planning and Organizing” and “Goal orientation/Result Orientation”. All these abilities and skills belong undoubtedly to the portfolio of managerial competences; so to say they form the equipment of a good manager.

Figure 5: Position "Manager" - a list of core competencies



As already stated above, the results obtained will be taken into account on adaptation of the Model of Strategic Competence Management within further realization of the Project COMPETE..!

In the last series of questions, respondents were subject to inquiring as regards their attitudes to applicability of final project outputs in practice, furthermore their approach to problems of evaluations of employees on a regular basis, implementation of motivation systems and also their opinions regarding employee education issues.

It is encouraging that the vast majority of respondents, likewise experts in the framework of specialized discussions performed, have given positive statements regarding the ICT instrument that will join elements of the strategic planning with evaluations and directing of proper employees towards reaching objectives planned. In several cases an opinion has been expressed that small- and medium-sized enterprises will not utilize such an instrument and that its setting is not efficient and/or they are able to do their work well even without such instruments. Nevertheless, generally, such opinions have been in minority.

As for implementation of the system of periodic evaluations of employees, the situation is relatively balanced; the system has been already implemented in a more-or-less formal manner roughly in one half of organizations. In the other half of them, the evaluation of employees is considered excessive, a useless formalism (according to our analysis, this applies mainly to companies of a family type where the evaluation of relatives is not a much-too-frequent matter).

The sphere of evaluation of employees is tightly associated with that of the motivation system for employees in enterprises. Our questionnaire survey provides relatively balanced results, which is also partially attributable to results of the previous issue regarding implementation of evaluation of employees (implementation of the regular evaluation system is usually accompanied by implementation of the motivation system). Important is the fact that enforcement of the implementation of our ICT instrument might be facilitated by the implemented formalized system of both evaluation of employees and their motivation.

As for the scope of information on importance of the lifelong learning and enhancement of professional and crucial competences and acceptation of this approach, relatively positive outputs have been produced by the research since approximately 2/3 of respondents provide their employees with education in one or another way. And this finding is undoubtedly interesting when taking into account the fact that this is a sector characterized by a high scope of fluctuation, by a high share of foreign labor force, and a sector with the highest extent of utilization of employment contracts for a definite period of time.

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CONCLUSIONS AND RECOMMENDATIONS FOR THE TRANSFER

The final part of the Report summarizes and overviews the above-mentioned most important findings and conclusions made in the framework of realization of this stage of the Project.

- The transfer of the product is possible in terms of its feasibility.
- The transfer of the product is desirable according to the majority opinion of the target group.
- The user environment of the product must be friendly for the user.
- The product should not be much too complicated.
- It is advisable to carry out further investigation in order to cope in detail with particular problems encountered by managers of HORECA sector organizations on an everyday basis as regards insufficient competences of their employees.

Typical features of the HORECA sector which should be taken into account on the transfer and adaptation of the product:

- HORECA is a significant resource of employment for the young labor force.
- HORECA is a significant employer of women (a proportionally higher share).
- HORECA is a sector characterized by employing persons with a lower standard of education.
- HORECA exhibits a generally lower standard of everyday work with computers.
- HORECA shows a high share of contracts of employment for a definite period of time.
- HORECA exhibits a shorter period of staying of an employee with the same employer, on the average.
- HORECA is affected by a strong factor of seasonality.

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