Report on tasks to be developed to improve skills and professional figures through VET

DEL 2.4 – WP2

Index

1.   Some tourism data in partners Countries

1.1.   The tourism infrastructure and impact on economy

The number of bed places available in hotels and similar tourist accommodation establishments provides one measure of a country's capacity to attract tourists. In 2021, in Albania there are 85 000 bed places, 24 000 in North Macedonia and 12 000 in Kosovo.

The bed place capacity in Albania increased by almost 5 times or 362 % from 6.5 in 2011 to 30.2 in 2021. Thus, from having almost the lowest capacity of bed places relative to the population in 2011, Albania had the second highest capacity among these countries (both relative to the population and in absolute numbers) in 2021. In addition to an increased interest in Albania as a tourist destination, this apparent increase reflected efforts by the government to formalize the economy and stimulate the tourist accommodation sector. A value added tax reform in November 2017 reduced the VAT rate applicable to tourist accommodation services from the standard 20 % VAT rate to 6 %. However, in order to benefit from the reduced rate, the tourist accommodation services had to be registered in separate companies without other economic activities. The threshold for compulsory VAT registration was also lowered from ALL 5 million to ALL 2 million turnover per calendar year. As a result, many bed places not previously captured by the statistics were registered from 2018, creating a break in the time series.

In comparison, the relative capacity in the EU increased by 5 % from 25.8 to 27.1 over the same period.

Bed places in hotels and similar accommodation establishments, 2011-2021
(thousands)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
EU (¹)	11 369	11 481	11 556	11 643	11 796	11 841	11 975	*12 140*	12 324	*11 886*	12 118
Bosnia and Herzegovina (²)	24	21	24	26	27	31	33	34	36	28	33
Montenegro (³)	41	35	:	:	:	36	36	36	37	:	:
North Macedonia	14	15	16	17	18	20	21	23	24	24	24
Albania (²)	19	16	11	14	15	:	:	69	78	82	85
Serbia	:	51	56	54	:	:	:	53	:	:	53
Türkiye	:	:	749	805	:	1 240	1 433	1 477	1 529	1 588	1 677
Kosovo* (²)	:	:	:	:	:	11	11	11	12	12	12

* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo Declaration of Independence
(:) not available
(¹) 2018, 2020: estimates.
(²) Data supplied by and under the responsibility of the national statistical authorities.
(³) 2011: low reliability.
Source: Eurostat (online data code: tour_cap_nat) and Eurostat data collection

eurostat

The number of bed places per thousand inhabitants, in the period 2011-2021, grew particularly in Albania and North Macedonia.

For Kosovo, data on the number of bed places available in tourist accommodation establishments are available from 2016 onwards. These were the lowest numbers recorded in WBT countries in 2016-2021. As a result, relatively moderate changes in the absolute number of bed places were reflected in major swings in the index, which is based on 2016 for Kosovo (2016 = 100.0). The index was at the same level in 2017 and then fell year-on-year by about 3 points from 2017 to 2018, before rising by 8 points the following year. Then the level flatlined and remained unchanged in 2020 before rising by almost 3 points in 2021.

Bed place capacity in hotels and similar establishments, 2011 and 2021
(bed places per thousand inhabitants)
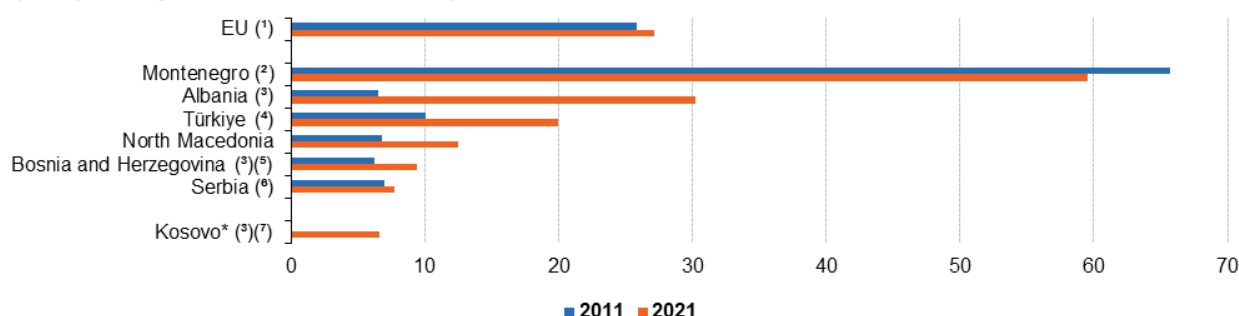
* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ
Opinion on the Kosovo Declaration of Independence
Note: countries are ranked based on 2021 data
(¹) Population: 2021 estimates.
(²) Bed places: 2011: low reliability. 2019 data instead of 2021.
(³) Bed places: data supplied by and under the responsibility of the national statistical authorities.
(⁴) Bed places: 2013 data instead of 2011.
(⁵) Population: 2018 data instead of 2021. 2021: provisional.
(⁶) Bed places: 2012 data instead of 2011.
(⁷) 2011 data not available. Population: 2020 data instead of 2021. 2021: estimates.
Sources: Eurostat (online data codes: tour_cap_nat and demo_gind) and Eurostat data collection

eurostat

Over the past decades, tourism has experienced continued growth and deepening diversification to become one of the fastest growing economic sectors in the world (UNWTO, 2019). In the last twenty years, it also grew rapidly in the Balkan region, growing from less than 4 million foreigner visitors in 1999 to more than 27 in 2018.

the climate of insecurity caused by conflicts (most recently resulting from the dissolution of Yugoslavia between 1991 and 2001) delayed the mass tourism boom that other Mediterranean countries have enjoyed since the 1970s.

Due to the region being 'undiscovered' and 'unknown,' today the entire Balkan region is going through a golden age of tourism growth. The increasing importance of tourism in the economic structure of Balkan countries is undeniable. Lonely Planet – the colossus of travel guides – awarded Albania the best destination of 2011.

In order to compare the WB countries, the table above includes a 'Tourism Growth Index 2017/2027' in the last row. This index is calculated according to the data included by the World Travel and Tourism Council (WTTC) in its annual Country Reports. The average growth for this time frame is 35%, with Croatia, Montenegro, and Serbia above the average, and Albania slightly under the average, followed by the Republic of North Macedonia and Bosnia and Herzegovina. These tourism growth rates confirm that the entire region has become an important international tourism destination over the last two decades. The importance of the tourism sector is also confirmed by its contribution to national GDPs.

International Tourist Arrivals (in million per year)

YEAR	ALB	KOS	MKD
1990	0,03	N/A	0,562

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YEAR	ALB	KOS	MKD
1999	0,039	N/A	0,181
2010	2,191	0,034	0,262
2015	3,784	0,079	0,486
2017	4,261	0,086	0,529
2018	5,34	N/A	0,707
2027	6,25	N/A	0,754
Tourism Growth Index 2017-2027	31,84%	N/A	29,84%

Source: Tourism Development in the Western Balkans: Towards a Common Policy Enrico Porfido, Annual Review of Territorial Governance in the Western Balkans, II, 2020, 24-45 https://doi.org/10.32034/CP-TGWBAR-I02-03 (base on UNWTO 2000, 2016, 2017, 2019) and Kosovo Agency of Statistics, 2020)

Tourism assumes an essential role in boosting socio-economic growth, especially in developing countries. This industry in this region is a significant factor in the democratization process, acting as a driver for EU integration of the region.

Yet, tourism's strict interdependence with other sectors such as the environment, education, health, and transport, makes it even more challenging to reach the goals countries' have for the sector. For example, the tourism sector strongly relies on local human capital, which means that tourism and hospitality employees should be correctly trained for specific jobs (education sector) and that mobility should be facilitated both in terms of infrastructures and public transport (transport sector). Tourism is indeed a largely service-based sector, which ranges from travel, accommodation, transportation, activity planning, and food services, but also resource protection, conservation, and valorization.

In **Albania**, tourism is also a significant economic sector due to its contribution to a country's production system. WTTC data indicate that, in Albania, the economic activity generated by the 'Travel & Tourism' sector (including hotels, travel agencies, airlines, and other passenger transport services, excluding commuter services) amounted to $1.7 billion in GDP in 2022, accounting for 9.4% of the total GDP. In particular, Albania ranks 17th globally by direct contribution to the economy of the Travel & Tourism sector. The workforce comprises 97.7 thousand individuals (8.4% of total jobs), and investments amount to $270 million.

When considering the broader effects of investment, supply chain, and induced income impacts, the total contribution of the sector reaches $3.9 billion, equivalent to 21.6% of total GDP. The number of employees in the sector rises to 246.7 thousand, accounting for 21.2% of total jobs.

The economic and social dimensions of Albania's tourism sector are poised for further growth in the future. According to WTTC's forecasts, the direct GDP of the Travel & Tourism sector is projected to increase by an average of 3.6% per year to $2.5 billion in the period 2023-2033. During the same period, employment is expected to grow by 1.7% per year, inbound tourist spending by 3.5%, and domestic spending by 4.1%. Additionally, with an annual growth rate of 4.5%, the proportion of Travel & Tourism investments in the total is forecast to rise from the current 6.3% to 8% by 2033.

The strengths can be summarized as follows:

The Albanian sense of hospitality is well known and represents a 'unique resource', adding competitive value to features that can also be found in other countries, including the sea and sunny beaches, cities of art, inland quaint villages and snowy mountains.

Variety of landscapes and cultures within a small space: Albania is a sort of **'miniature Europe'** where tourists can, within a few kilometers, go from the mountains to the sea, from the experience of a somewhat 'archaic' village culture to the globalized culture of a large city or certain coastal resorts. There is also the possibility of encountering a city of art along the way or deviating to a UNESCO-listed site.

The Albanian tourism industry was born recently. This implies that hospitality facilities are, on average, **of recent construction**, which is a strength. However, one should not overlook the fact that buildings designed for hospitality have a shorter life cycle than those intended for other uses due to different maintenance requirements.

Seeking to enhance the quality of supply, and moving towards the development of an 'integrated' tourism system, where the seaside seamlessly blends with cultural, culinary, mountainous, and folklore experiences, while leveraging collaborative efforts with neighboring sectors, has the potential to substantially boost the economic prospects of Albanian tourism.

However, there are still weaknesses. The main one is the concentration of supply along the coastal areas, symptomatic of a substantial dependence on the 'sea' resource. This has several negative consequences, e.g. in terms of **marked seasonality of revenues**, overall underuse of accommodation capacity and other primary resources. What has just been stated is also demonstrated by a low value of the average stay indicator, which has a negative impact on a fundamental variable: the revenue from tourist spending by non-residents. Albania's dependence on Europe is also significant (over 90%), which indicates the need to diversify target markets.

Albania's closer alignment with modern development models will only be achievable through quality investments, such as **redevelopment, technology, training, and organization**. Some of these initiatives have already been launched in recent years. These investments need to consider the region's specific characteristics and be tied to an ongoing enhancement of **professional and managerial skills**.

Kosovo's tourism industry is still an emerging industry, at a very early stage of development compared to other Southeast European countries. This is largely due to a lack of investment for many decades, poor private sector tourism offers, a lack of educated staff, poor investor policies, and a lack of coordination between stakeholders and Government agencies. Although the number of tourists and overnight stays in Kosovo has increased significantly over the last ten years, the number of international visitors within a year is far from the region's average.

The largest number of tourists visiting the country is during the summer. This is believed to be mainly due to the diaspora, which has a major impact on the local economy and the tourism sector, in particular.

In Kosovo, according to the report of the Labor Force Survey (2018), the number of employees in the field of tourism is around 28,500 people. Tourism is assumed to directly contribute more than 1% to Kosovo's GDP, while the world average tourism contribution to GDP is 3.3%.[1]

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[1] Travel and Tourism Industry Development - The Case of Kosovo, Analele Universităţii din Oradea, Seria Geografie XXX, no. 2/2020, pp.147-156 ISSN 1221-1273, E-ISSN 2065-3409 DOI 10.30892/auog.302104-844 Idriz KOVAÇI, University of Applied Sciences in Ferizaj, Faculty of Tourism and Environment, Street "University", 70000, Ferizaj, Kosovo, e-mail: idriz.kovaci@ushaf.net Alberta TAHIRI University of Applied Sciences in Ferizaj, Faculty of Tourism and

The strengths of tourism in Kosovo are[2]:

Strong geographical position in the region and Europe; • Good and unique landscapes (rivers, lakes, parks, mountains, waterfalls, etc.); • Cultural heritage assets; • Special cuisine services; • Multilingualism; • Hospitality; • Uncharted tourist destinations; • Friendly culture; • Reasonable prices; • Wealth in the historical sense and historical countries sense; • It is already included in Western Balkan tourist packages; • Traditional events, festivals, night life; • New airport and highways; • The potential for transit; • The current increase in Government awareness of the tourism sector; • Attractive places and good weather conditions; according to seasons; • With the youngest population in Europe; • Protection and security; Kosovo's small area (fast connection between cities and tourist destinations); • Large diaspora participation in the tourism market in Kosovo; • Flexible and competitive business taxes

The weaknesses of tourism in Kosovo are:

Poor/average infrastructure (electricity, roads, water supply, sanitation, marking tourist destinations, etc.); • There are no competing tourism laws and regulations available; • Lack of Government support for the tourism sector; • Lack of certified guides; • Poor waste management; • Lack of environmental protection (especially of rivers, deforestation, and waste disposal); • There isn't a National Tourism Agency (NTA)/a National Tourism Organization (NTO) established; • Lack of adequate tourism statistics; • There isn't a strategy for tourism development; • Mismanagement of visitor centers in different municipalities; • Visa regime (especially towards countries with high potential for exporting tourists); • High cost of flights; • Lack of Government subsidies for flights; • VAT for tourists booking from abroad; • Lack of joint bids with other countries in the region; • Lack of municipal support for the tourism sector; • Lack of advertising Kosovo as a tourist destination

In **Macedonia**, tourism plays a significant role. The tourism in North Macedonia has seen continuous growth over the years. Thus, in 1995, an income of EUR 18.5 million from tourism was earned (0.4 % of GDP) and only an income of EUR 126 per tourist. After 2.5 decades, the contribution of tourism to the economic development of North Macedonia has increased significantly to an income of EUR 392 million or income of EUR 517 per tourist[3].

North Macedonia recorded a total of 294,000 tourists in 2021, ranking 122nd in the world in absolute terms. That smaller countries regularly perform lower in a comparison of the absolute number of guests, is obvious. By putting the tourist numbers in relation to the population of North Macedonia, the result is much more comparable picture: With 0.14 tourists per resident, North Macedonia ranked 92nd in the world. In Southern Europe, it ranked 13th.

These data indicate the approach towards tourism activities, which has the goal to maximize the contribution of tourism to the economic development of the country. Namely, since 2011, the Government has successfully introduced measures to subsidise tour operators and agencies working with incoming tourism. At the same time, many low-budget airlines opened, so North Macedonia became an easily accessible tourist

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[2] Source of strengths and weaknesses are sourced from Sustainable tourism development – analysis of tourism development in Kosovo Article in ACC Journal · October 2020, Alberta Tahiri University Haxhi Zeka, Idriz Kovaçi University of Applied Sciences in Ferizaj, Fari Bush

[3] World Data https://www.worlddata.info/europe/north macedonia/tourism.php

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destination. Thus, within a decade, international tourism had begun to develop, so in 2019, the number of foreign overnight stays almost equaled the number of domestic overnight stays.

With the exception of the pandemic year 2020, the average an income of EUR 295 million, i.e. the average annual rate of participation of total income from tourism in GDP is 2.7 %. It is expected these incomes to increase to more than EUR 450 million.

Direct tourism-related employment in North Macedonia counts about 30,000 jobs. On the other hand, when talking about the total employment in travel and tourism, that number is significantly higher and in 2019 there were 54,800 employees (6.9 % of the total No. of employees)[4]. It is also estimated that 1 out of 7 jobs is in the catering-tourism sector, covering 52-55 % of the total service.[5]

The comprehensive qualitative and quantitative appraisal of the current situation of Macedonia as a whole destination can be recapitulated through the following analysis[6].

Strengths: Macedonia is a new country in tourism development with well-preserved cultural and natural heritage; More particularly Macedonia boasts a very old history and a prestigious reference (Alexander the Great) and is, with Ohrid, one of the major sites of the Mediterranean World; Macedonia is at the crossroads of Roman, Slavic, Greek and Ottoman worlds, offering a very dense cultural diversity, which is a strong asset; Its mountain eco-tourism heritage and resources are very interesting and very well preserved; The wine tourism "niche" is also an important asset, very trendy today; More generally, the quality of agricultural produces and culinary and gastronomic heritage and know how; A privileged situation on the axis North Europe – Athens – Istanbul.

Weaknesses: Tourism facilities and infrastructures are mostly obsolete (except for Skopje where new hotels have been built) and of insufficient quality regarding actual norms and standards and the offer in the neighboring countries; The image of a country "in war", although not true, can disappear over a longer period of time, in the minds of poorly informed European markets; The Government does not seem to have as yet secured adequate means for implementation of indispensable facilities and infrastructures (among other, tourism signage) and in order to set up the basis for tourism development and attract investor and tour operators; The means allocated to tourism observation and promotion and to heritage protection are still insufficient; The breakdown of competences and the coordination between the central government and the local authorities are still far from being appropriate; the tourism welcoming facilities and tourism information offices have too low objectives and too limited means; The cooperation between the public bodies and the private operators is sporadic but not yet sufficient; The image of Macedonia as a country is still fuzzy, and its belonging to the Balkans, a better identified region, is not known enough; Therefore Macedonia does not meet the conditions to be already now integrated in the offerings of European tourism operators.

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[4] WTTC (2022), Annual Research: Key Highlights. http://wttc.org/Research/Economic-Impact
[5] APSTRNM, 2023 Strategic Plan. https://tourismmacedonia.gov.mk/wp-content/uploads/2022/09/Stratesko-planiranjena-APPT-za-2023.pdf
[6] Tourism in Macedonia in Changing Environment, Article in Procedia - Social and Behavioral Sciences · December 2012 DOI: 10.1016/j.sbspro.2012.05.001, Naume Marinoski, PhD Professor (Full) at University "St. Kliment Ohridski" – Bitola, Saso Korunovski PhD Professor (Full) at University "St. Kliment Ohridski" - Bitola

1.2.   Tourism trends and data in Albania

Tourism Arrivals
- In 2022, Albania welcomed over 7.5 million tourists, a record high.
- This represents a 36% increase from 2021.
- The majority of tourists come from Europe, with Italy, Greece, and Germany being the top three source markets.
- Domestic tourism is also growing in popularity, with Albanians making up 20% of all visitors in 2022.

Tourism Revenue
- Tourism generated over €3.5 billion in revenue in 2022, a 42% increase from 2021.
- This makes tourism the largest sector of the Albanian economy.
- The average spend per tourist is €460.

Top Tourist Destinations
- The most popular tourist destinations in Albania are Tirana, Berat, Gjirokastër, Shkodra, and Kruja.
- These cities offer a mix of historical landmarks, cultural attractions, and natural beauty.

Hotel Occupancy
- Hotel occupancy rates in Albania reached 68% in 2022, up from 52% in 2021.
- This is the highest occupancy rate in the country's history.
- The majority of tourists stay in hotels in Tirana, Berat, and Gjirokastër.

Tourism Challenges
- While tourism is growing rapidly in Albania, there are a number of challenges that the country needs to address.
- These include:
  o Lack of infrastructure, such as roads and airports.
  o Limited English language skills among the population.
  o Overcrowding in some popular tourist destinations.

Tourism Opportunities
- Despite the challenges, Albania has a number of opportunities to further develop its tourism sector.
- These include:
  o Investing in infrastructure development.
  o Improving English language skills among the population.
  o Promoting Albania as a unique and authentic destination.

Overall, tourism is a major driver of economic growth in Albania. The country is well-positioned to continue attracting more tourists in the years to come.

1.3.   Tourism trends and data in Kosovo

Tourism Arrivals
Tourism sector has been experiencing steady growth in recent years, with a notable increase in visitor arrivals after the COVID-19 pandemic. In 2022, Kosovo welcomed over 1.2 million international tourists, representing a significant rebound from the 688,000 arrivals in 2021. This growth was attributed to the easing of travel restrictions, improved infrastructure, and enhanced marketing efforts.

Tourism Revenue
The surge in tourist arrivals translated into substantial revenue for the tourism industry. In 2022, tourism generated approximately €600 million in revenue, a significant increase from the €350 million generated in 2021. This growth is projected to continue in the coming years, driven by the expansion of tourism infrastructure and the diversification of tourism products.

Top Tourist Destinations
Kosovo's diverse landscape and rich cultural heritage offer a wide range of attractions for visitors. Popular tourist destinations include Peja, Prizren, Gjakovë, Gjilan. These destinations offer Ottoman architecture, vibrant bazaars, picturesque mountains and impressive architecture, for hiking, sightseeing, exploring the stunning natural beauty and also for cultural experiences and outdoor adventures.

Hotel Occupancy
The increasing number of tourist arrivals has also had a positive impact on hotel occupancy rates. In 2022, hotel occupancy rates in Kosovo reached an average of 56%, signifying a significant improvement from the 42% occupancy rate in 2021. This trend is expected to continue, driven by the growing popularity of Kosovo as a tourist destination.

Tourism Challenges and Opportunities
Despite its promising growth, Kosovo's tourism sector faces some challenges that need to be addressed to fully realize its potential. These include:
Limited marketing and promotion efforts to attract visitors from beyond the region.
Need for further investment in tourism infrastructure, particularly in transportation and accommodation facilities.
Addressing concerns about security and safety, which may deter some potential visitors.

To overcome these challenges, Kosovo is focusing on improving its tourism infrastructure, expanding its marketing reach, and enhancing its security measures. The country is also working to diversify its tourism offerings, focusing on niche markets such as ecotourism, cultural heritage tourism, and adventure tourism.

With its rich history, diverse culture, and stunning natural beauty, Kosovo has the potential to become a major regional tourism hub. By addressing the challenges and capitalizing on its strengths, Kosovo is well-positioned to attract more visitors and contribute significantly to the country's economic growth.

1.4.   Tourism trends and data in North Macedonia

Tourism Arrivals

North Macedonia welcomed over 1,185,000 tourists in 2019 (757,593 foreign tourists), 457,514 in 2020 (118,206 foreign tourists), 702,463 in 2021 (293,963 foreign tourists), 969,277 in 2022 (537,436 foreign tourists

Foreign exchange inflow based on tourism (compared by years - in millions USD).
The chart shows us that:

- between 2019 and 2020 there was declining in tourism inflow by 36.3%, or the inflow of 395,92 million USD from 2019, dropped to 252,05 million USD in 2020.
- between 2020 and 2021 there was increasing in tourism inflow by 52.8%, or the inflow of 252,05 million USD in 2020, raised to 385,04 million USD in 2021.
- between 2021 and 2022 there was also increasing in tourism inflow by 24.8%, or the inflow of 385,04 million USD in 2021, raised to 480,38 million USD in 2022.

Source of data -https://tourismmacedonia.gov.mk/?lang=en

Foreign exchange inflow based on tourism (compared by years - in millions of USD)
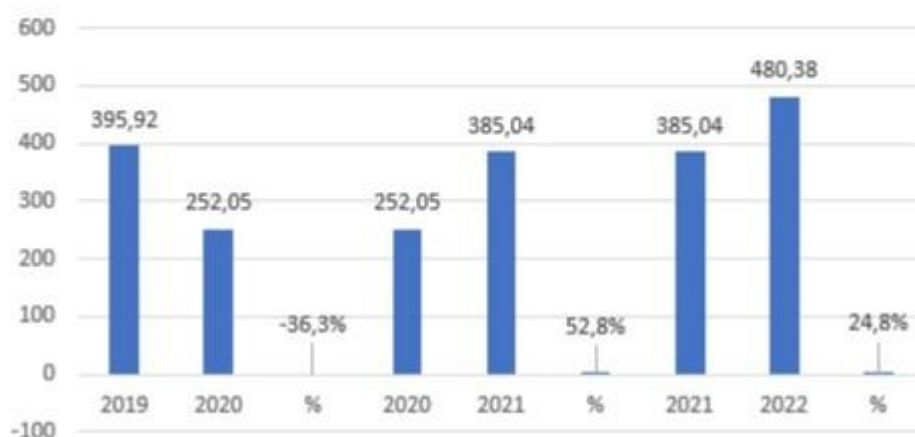
Foreign exchange inflow based on tourism in millions USD - the firs 3 quarters 2019 – 2023-
The chart shows us that in Macedonian economy the revenue from tourism sector in 2019 (it is measured only the first three quarters of the year) was 308.05 mill. USD, in 2020 was 181,96 mill USD, in 2021 was 298,84 mill USD, in 2022 was 376,46 mill USD and in 2023 it was 471,59 mill USD.
Source of data - https://tourismmacedonia.gov.mk/?lang=en

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Foreign exchange inflow based on tourism in millions of USD- The first 3 quarters 2019-2023
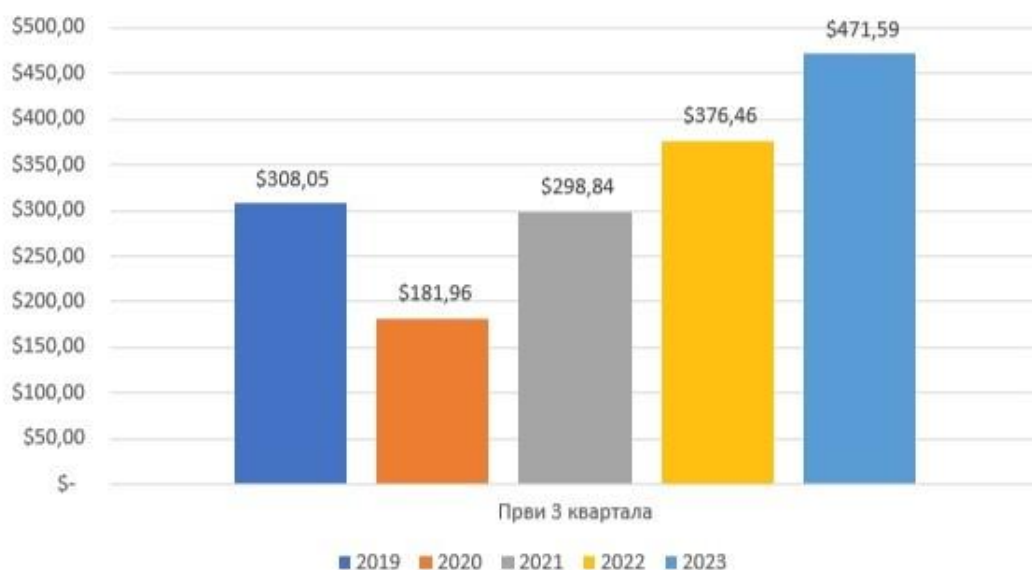
Top Tourist Destinations

The most popular tourist destinations in North Macedonia are Ohrid, Skopje, Struga, Bitola, Mavrovo, Krushevo, Vevchani, Tikvesh region and Tetovo.

- Ohrid, a UNESCO World Heritage site, is known for its stunning natural beauty, picturesque lake, and historical Old Town.
- Skopje, the capital city, offers a blend of Ottoman and European architecture, lively cultural attractions, and vibrant nightlife.
- Bitola, the second-largest city, boasts a rich Ottoman heritage, charming historical neighborhoods, and proximity to the Prespa Lakes National Park.
- Struga is another town that enriches the unique Macedonian experience. Followed by traditional food, nice and relaxing coffee shops, and restaurants, offering a beautiful view of the lake.
- Tetovo, a multicultural city with a predominantly Albanian population, offers a unique blend of traditional Albanian customs and modern urban life.
- A wonderful piece of nature in the village of Vevhani. It can be visited at any time of the year, but in spring the springs have the most water when the snow melts.
- Mavrovo is Macedonian's biggest winter resort which covers 730sq km of forests, gorges, waterfalls and karst fields.
- Tikveš is one of the biggest regions in Macedonia by square area. The climate is mixed, Continental-Mediterranean. Tikveš is the center of Macedonian wine and rakija production.
- Krushevo is a small city but very charismatic and full of history. Krusevo is considered to have one of the best sites for paragliding in the world. The take-off from Meckin Kamen this year welcomes dozens international competitions in paragliding and gliding.

Accommodation

The majority of tourists stay in hotels in Ohrid, Skopje, Struga and Bitola.
Viewed by years: in 2019 - 80% of the tourists stayed in hotels, in 2020 - 65%, in 2021 - 70%, in 2022 -76%.

Tourism Challenges

Despite the recent growth, North Macedonia's tourism sector faces several challenges that need to be addressed to fully realize its potential. These include:

- o   Limited marketing and promotion efforts to attract visitors from beyond the region.
- o   Need for further investment in tourism infrastructure, particularly in transportation and accommodation facilities.
- o   Enhancing language skills among the tourism industry workforce to better communicate with international visitors.
- o   Diversifying tourism offerings to attract a wider range of tourists

Tourism Opportunities

To overcome these challenges and capitalize on its strengths, North Macedonia is focusing on:

- o   Improving its tourism infrastructure, including expanding airport capacity, upgrading roads and railways, and enhancing accommodation facilities.
- o   Expanding its marketing reach, particularly through digital platforms.
- o   Diversifying its tourism offerings by developing eco-tourism, culinary tourism, and adventure tourism experiences.

2.   The framework of Dual system in V.I.R.Tu.A.L. partner countries

2.1 Education System in Albania[7]

Article 57 of the Constitution of Albania provides that everyone has the right to access education and basic education is mandatory for all.

Education in Albania is provided by both public and private institutions at all levels.

The **Ministry of Education and Sport** [https://arsimi.gov.al] is responsible for Pre-university Education and for Higher Education. According to the Constitution, the Government and Parliamentary Bodies determine the educational policy for tertiary education.

The **Ministry of Finance and Economy** [https://financa.gov.al/] is responsible for VET.

For the sake of clarity, for the purpose of this document, **VET** stands for "Vocational education and training (VET)" a field of professional skills that combines education with professional practice, which equips individuals with special knowledge and skills, as well as with broad competencies that are required to be employed in a certain profession and to be integrated into the labor market (Article 4 of Law No. 15/2017 on education and professional training in the Republic of Albania[8]). From the formal education point of view, it includes pupils aged 15 /16 - 19 years old (high school).

2.1.1.   Form of education in Albania

The forms of education in Albania are as follows: Pre-University education, Higher Education.

Obligatory education age in Albania is from 6 to 16 years old. It includes basic education and lower secondary education.
Classification of education level in Albania is done based on codes 0,1,2,3 in reference to the "International Standards of education" approved by UNESCO General Conference in 1997 and in levels based on Law no. 10 247, dated 4.3.2010, "On the Albanian qualifications framework", as amended.

Based on this classification, the education forms are:

• **Preschool education** [Arsimi parashkollor] from 0 to 6 years old which is not obligatory.

• **Basic education** [Arsimi Bazë] starts at the age of 6 and ends at the age of 16 years old and is compulsory. It is composed by two cycles:
• *primary cycle* [Arsimi fillor] Code 1. Composed of five classes (classes I-IV)
• *lower secondary education* [arsimi i mesëm i ulët] composed of four classes (classes VI-IX). The pupils that are 16 years old but did not complete primary education can complete it in part-time schools. Basic education for pupils with limited abilities is organized in special schools, in special classes within normal schools or integrated in normal classes.

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[7] Note: the material used for the preparation of this section is mainly retrieved from https://eurydice.eacea.ec.europa.eu/national-education-systems/albania/overview
[8] Law 15/2017 may be accessed here https://qbz.gov.al/eli/ligj/2017/02/16/15-2017

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•   **Upper secondary education** [Arsimi i Mesëm i lartë] is optional and starts at the age of 16 years old.
Higher secondary education in Albania is composed by:

•   **General Upper Secondary education** [Gjimnazet], which lasts three years and is composed by three classes.

•   **High schools** [Shkollat e Mesme Profesionale] has a duration of two to four years. It is structured at three levels based on Albanian National Qualification Framework.

•   **Oriented Education Schools** [Shkolla të arsimit të orientuar] include art schools, sport schools, foreign languages schools and schools oriented in other education areas. Admission in these institutions is done based on specific criteria set by specific Decision of Council of Ministers.

All types of higher secondary education mentioned above are completed once the State Matura Exam is finished (which includes common subjects namely Albanian Language and Literature, Math and one foreign language and also subjects by choice).

Higher Education

Higher education institutions in Albania are both public and private. They may either be Universities, Academia, University College and Professional College. Educational institutions have equal status, regardless of ownership type or founder's identity. The law regulating Higher Education is Law On higher Education and Scientific Research in the HEIs in the Republic of Albania[9].
Currently, there are in total 39 higher education institutions, out of which 13 public and 26 private ones that operate in the territory of Albania[10].
Admission of students to a first cycle study program (Bachelor) is possible for each candidate that has successfully completed higher secondary education and meets the criterion of average GPA annually approved by Decision of Council of Ministers. HEIs may set additional admission criteria for selection of candidates, which criteria are published and filed with the Ministry of Education and Sport. Please note that the average GPA is not applicable as an entry criterion to the professional study programs.

The above is presented in Picture 1 below.

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[9] Law may be accessed here: https://www.unitir.edu.al/images/dokumenta/Legjislacion/Ligj_80-2015_22.07.2015.pdf
[10] See https://ualbania.al/pages/universitetet.html

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(source: https://eurydice.eacea.ec.europa.eu/national-education-systems/albania/overview)
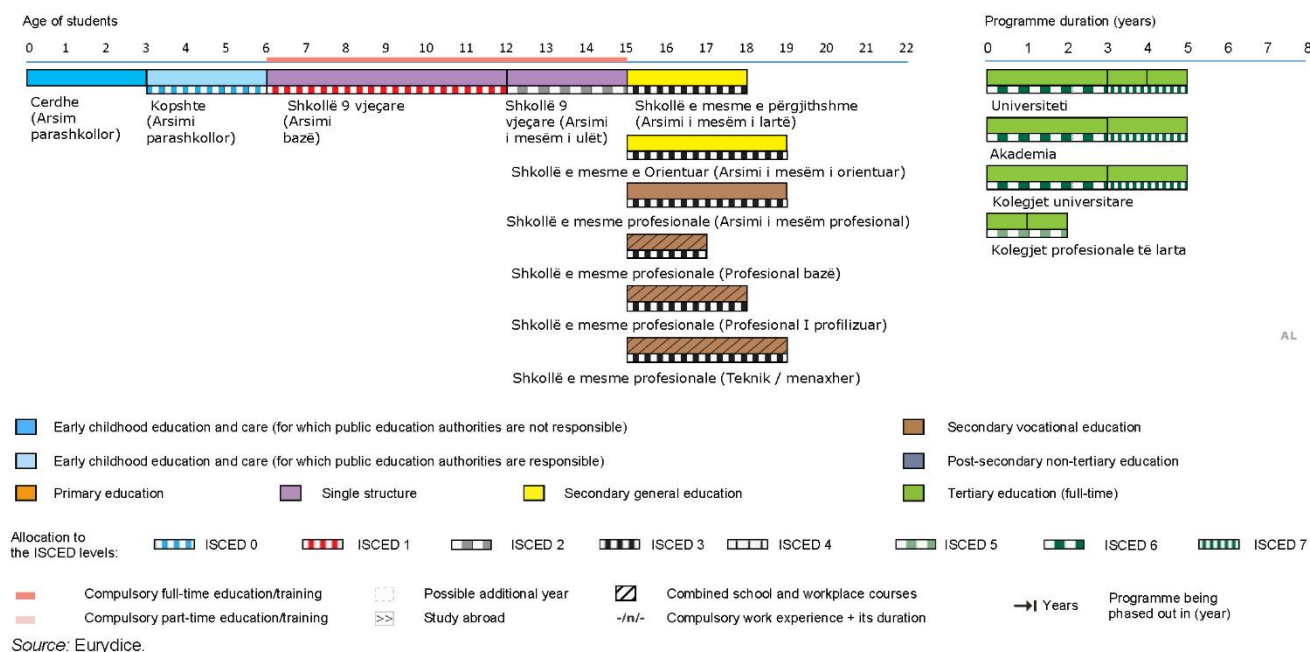
2.1.2. Vocational Education

In a general overview, the Albanian Economy is based on 5 pillars:

1. Agriculture and its derivates (in terms of production, food processing, oil and dairy production etc. with special focus on fruits, olive, nuts etc., machine related to agriculture). There is a specific strategy and authority to support rural development as well as the management of EU financing projects.
2. Tourism and its derivates, from agro - farms as business family to well established resorts, slow food, traditional food, historic attraction, hiking, nature etc.). The sector is growing and beside hospitality staff, it is also in need of maintenance staff in terms of building and its related maintenance system (such as electrical, HVAC, lifts etc). This requires the employees to be familiar with English language at least.
3. Energy production; besides electrical energy, favorable hydrologic conditions, increased interes is having investment in photovoltaic and Eolic parks etc.
4. Gas and gas related investment (gas pipeline) in the short and long term.
5. Mining industry with focus on iron, chromium, as well as oil and gas.

Albania had quite a good history of VET until the '90, although it was politically motivated and driven in the given conditions of the dictatorship. There was a well-established VET ecosystem both in high and higher education but no internationalization at all, given the isolation of the country during the communist regime. Unlike its neighbors, Albania did not maintain the system of vocational education and industrial development during the transition years.

During the transition years, with the establishment and opening of many private universities, there was the approach that getting a university degree was the only way to succeed in the future. In fact, it was not like that. This produced a lot of disappointment in the generations of these graduates, who did not actually find employment opportunities in the market, as their profiles did not match with the requirements of the labor market. In the same time this resulted in the disappearance and lack of many professions and practice - oriented specialists, which is as necessary and indispensable for development industry and services in our country. Such a mentality is now on its way to change. The education system should not simply tackle unemployment but balance the real needs of the marker for the development of the country. The Albanian Government has continuously emphasized the importance of vocational education but most of the attention is given to high vocational education (aged 15 -19). There are also initiatives or projects in this regard or other programs supported from EU donors.

The **Ministry of Finance and Economy** is responsible for VET, except for VET in higher education (60/120 ECTS which falls under the responsibility of Ministry of Education and Sports).

In this document we will not refer to VET in higher education, but only to VET offered under *VET Law.* The professional qualifications contain levels 2, 3, 4 and 5 of the Albanian Framework of Qualifications (KSHK) (article 16, section 2, of VET Law).

Currently some of the main legislation in force regulating VET in Albania are as below mentioned:

VET Law (2017)[11]
Law on Pre-university Education (2012), as amended
Law on Albanian Qualifications Framework (AQF) (2018), as amended
Labor code (2015), as amended
Law on Craftsmanship (70/2016)
Employment Promotion Law (2019)
National education strategy 2021-2026[12]

Before, in 2014, the National Employment and Skills Strategy (NESS) 2014– 2020 was adopted, considered an important milestone since this was the first time that a national strategy paper had addressed employment promotion and Vocational Skills Development as one entity ((*Review of Albania's Vocational Education and Training System, may 2020, pg 8).*

The above - mentioned law are subject to have related sublegal acts with regard to their enforcement, whose adoption has taken time. The legal frame work appears to be quite ample although its implementation in practice needs improvement.

2.1.3.   Dual Education

VET LAW in its Article 12 provides who VET providers are:

1. VET is provided by public and private institutions.

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[11] Law may be accessed here https://qbz.gov.al/eli/ligj/2017/02/16/15-2017
[12] The Strategy may be accessed here: (https://arsimi.gov.al/wp-content/uploads/2021/05/Draft-Strategjia-per-Arsimin-2021-2026-1.pdf

2. VET provider institutions are:

a) vocational secondary schools;

b) multifunctional centers of VET;

c) professional training centers;

ç) specialized VET institutions for special groups;

d) commercial companies;

dh) other licensed and/or accredited institutions or individuals.

With regard to Dual education[13], while there is no separate Law regulating the Dual Education in itself, the VET Law provides the definition of dual VET (article 4, "Definitions"), as follows:

"Dual form of VET" is a type of vocational education and training provision, which combines the qualification in a VET institution with work and practical training in the enterprise, in based on the provisions of an agreement between the employer and the employee (student) and VET providers.

Further, Article 16, "Professional qualifications and relevant levels", inter alia, provides:

1. The benefit, recognition and certification of professional qualifications in Albania is based on standards of qualifications, which contain the knowledge, skills and competencies that the student must achieve or trainee.
2. The professional qualifications contain levels 2, 3, 4 and 5 of the Albanian Framework of Qualifications (AFQ).
3. Full or partial professional qualifications can be obtained through these forms:
....
c) registering as a student, being employed in an enterprise (dual form);

Article 22 "Dual VET form"
1. The dual form of VET is offered in cooperation between employers and institutions responsible for VET.
2. The main environment for obtaining professional qualification is the workplace, based on a contracts between the employer and the student (employee), in accordance with the provisions of the Labor Code.
3. VET providers offer the opportunity to complete the student's professional qualification.
4. Long-term qualifications, obtained through the dual form of VET, are part of Albanian Framework of Qualifications.

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[13] Note: in the Review of Albania's Vocational Education and Training System, May 2020, it is possed the question as follows: A key question to be answered by Albanian decision makers and stakeholders in this regard is How dual should the system be? It asks whether VET should remain just another vehicle to higher education or become an own, self-standing career path that generates a workforce that is skilled and agile, to boost productivity and economic growth. The reasoning behind this is that the economic actors—employers—will hesitate to support a VET system that is VET only in name, but in reality, rather a disguised general education programme. Businesses need to see the value and benefits of being engaged in training, i.e. the availability of a qualified workforce. VET needs to be understood as a collaborative task of the state and the private sector to deploy its full potential. This can only be realised if the private sector and the representative bodies become equal, responsible and informed collaborators in the governance and implementation of VET.

5. For professional qualifications, obtained in the field of craft activity, the provisions of Law on Craftsmanship apply[14].

Further, Article 13 "Governing Board of public VET" provides that the Governing Board of public VET providers is a collegial body, which adopts decisions on general strategic direction, general planning and use of human resources, financial, material and physical and supporting the activity of administration of public VET providers, in accordance with applicable legislation. The Board consists of representatives of the public and private sector, *inter alia* (a) two representatives of the private sector related to the profile of the VET institution, whereas one of them is elected as Chair. So having the business on board, is thus a legal requirement.

Previous research suggests that: "Systemic private sector engagement is a key feature of every quality VET system and probably the biggest challenge for transition countries such as Albania, where VET has always been considered a state responsibility: initiated and designed at central government level with a focus on educational attainment rather than responding to the labour market needs.
Albania's VET system is still driven more by general education than understood as demand-based professional training aiming at employability of the graduates (*Review of Albania's Vocational Education and Training System, May 2020, page 8*).

It may be noted that:
Although the legal frame on VET and Dual VET is already in place, the Dual form is not yet smoothly implemented, [15]except for any exceptional cases, mainly piloted with the help of foreign projects/donors. The relation between schools and business seems to be minimalist in this perspective. The implementation in practice needs improvement, commitment and efforts from all the stakeholders. It is worth emphasizing

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[14] As an example, Albania is currently piloting a dual VET approach in the crafts sector; established by law in 2016, the National Chamber of Crafts has been given the legal mandate to establish dual forms of learning in crafts occupations. Nevertheless, this attempt is in a very early experimental phase and not coordinated with initial formal VET in secondary schools. Some pilots are run in selected trades with employees of chamber member companies in cooperation with a private training institute. It is now time for discussion between the Chamber of Crafts, the governing VET bodies (MFE, NAVETQ and NAES) and the industry over how far this model can be aligned to the overall reform efforts in initial VET programmes to avoid a situation where both systems drift apart instead of joining forces and utilising synergies. The closest forms of business cooperation take place at the provider level. Nevertheless, initiatives to establish school–business relations, to e.g. arrange work-based learning activities, originate in most cases from the schools. Although the presence of two business representatives on the school board is a legal requirement (one of which has to be elected as chair), businesses do not pro-actively approach VET providers. This is because business collaboration in VET is not historically rooted in Albania and, thus, remains a new, and for many Albanian companies (especially micro firms) still an unknown phenomenon (Review of Albania's Vocational Education and Training System, pg 10).

[15] A survey of DIHA and F. Erbert Stiftug, "VOCATIONAL EDUCATION & TRAINING IN ALBANIA
Companies ask for better skilled workforce in Albania', suggested that such is missing in Albania (see https://www.diha.al/fileadmin/user_upload/PDF-Unterlagen/Konjunkturumfragen/Report_on_Poll_Results_-_EN.pdf ; another document, REVIEW OF THE REGULATORY FRAMEWORK AND PROVISION OF POST-SECONDARY AND HIGHER VET IN ALBANIA, January 2022, notes that: "the relationships between educational institutions and employers are minimal. There is insufficient orientation of education to the needs of the labour market; curricula are too theoretical, practical training of students is weak, and learning on the job is not well organised. The conclusion is that the current post-secondary system needs to be improved so that it better caters for the needs of the labour market and the students (see https://www.undp.org/sites/g/files/zskgke326/files/2022-05/Review%20of%20the%20Regulatory%20Framework%20and%20Provision%20of%20Post-Secondary%20and%20Higher%20VET%20in%20Albania.pdf, page 5)

that for the practice perspective, the curricula in vocational high school includes compulsory professional practice modules for the pupils which are then realized in business and industry.

Other initiatives to foster dual education are encouraged and enforced from different donors or on project-based approach (such as 'Skills for Jobs' (S4J) - Swiss Agency for Development and Cooperation (SDC) project implemented in Albania by Swisscontact. The main project aim is to upgrade vocational education and training (VET) in Albania through digitalization, modernization and inclusiveness. See https://skillsforjobs.al/what-we-do/ or **VET TO VET – Capacity building in Albania (V2V_AL),** https://efvet.org/vet-to-vet-capacity-building-in-albania-2/

2.1.4.   VET in Hospitality Tourism

"**Hospitality-tourism**" offered by the schools has the structure 2+1+1 and 2+2.

The successful completion of the professional qualification "Hospitality-tourism", level II of AQF, provides the student with the certificate of a semi-qualified employee (assistant) in this area, being entitled to continue education at level III of Albanian Qualification Frame (AQF) (one year), in one of the learning profiles of this area:

1. Bar-Restaurant

2. Kitchen - pastry shop

a. Kitchen-pastry (pilot)

3. Reception

a. Reception (pilot)

4. Tourist guide

5. Hotel and restaurant services

6. Travel and tourism services

The successful completion of the professional education in the "Hospitality-tourism", level IV of AQF, equips the student with the Diploma of the State Vocational Matura, as well as with the Manager's Certificate in the field of hospitality-tourism.

This qualification gives the student the opportunity to approach the labor market for employment in the accommodation sector, in food and beverage businesses, in travel and tourism agencies, as well as in all sectors and businesses that provide accommodation services, food, drink, entertainment and events.

Upon completion of this level, the student has the opportunity to continue his education at the post-secondary level or at the level of university studies.

On a national scale, there are 12 vocational high schools that offer the Hospitality Tourism program, distributed in the following regions:

1. Agricultural Vocational School, Kamez

2. School of Hospitality - Tourism, Tirana

3. Isuf Gjata School, Korce

4. Hysen Çela School, Durrës

5. Enver Qiraxhi School, Pogradec

6. Antoni Athanas School, Saranda

7. Kolin Gjoka School, Lezhë

8. Hamdi Bushati School, Shkodër

9. Kristo Isak School, Berat

10. Trade School, Vlora

11. Sali Ceka School, Elbasan

12. Nazmi Rushiti School, Dibër (offers this year for the first time)

The school program is the same, thus a unified one, for all the above-mentioned schools, based on the curricula frame for Hospitality Tourism program, as so approved from the national body in charge, namely AGJENCIA KOMBËTARE E ARSIMIT, FORMIMIT PROFESIONAL DHE KUALIFIKIMEVE (AKAFPK).

With regard to dual activities (provided within the course), for example internship, work in companies (apprenticeship, etc.), simulation in classroom with companies' support, guided visit, other kind of dual activities (to be specified), kindly note that for each provided course, the syllabi mention as well in regard to this issue:

I.e This module should be handled in real working environments of hotels, restaurants or other environments where food and drinks are served, as well as in environments where receptions and banquets take place, but visits to businesses that offer this service are also recommended; For the proper implementation of the module, it is necessary to provide the following environments, tools, equipment and materials: Real restaurant or school restaurant. Or This module should be handled in classrooms as well as in the professional practice environments of the school, equipped with the appropriate tools. This module can also be handled in real work environments in the hotels and tourism sector businesses, with real clients.

Table 1. Number of enrolled pupils in professional schools that offer the "Hospitality-Tourism" major during the 2021-2022 & 2022-2023 school year

School	Region	Total number of enrolled pupils 2021-2022	Number of enrolled pupils Class X, academic year 2022-2023
Antoni Athanas	Vlorë, Sarandë	87	34
Enver Qiraxhi	Korçë, Pogradec	65	28
Hamdi Bushati	Shkodër	425	153
Hoteleri Turizem	Tirana	641	200
Hysen Çela	Durres	494	133
Isuf Gjata	Korcë	93	41

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School	Region	Total number of enrolled pupils 2021-2022	Number of enrolled pupils Class X, academic year 2022-2023
Kolin Gjoka	Lezhë	169	34
Kristo Isak	Berat	144	46
Profesionale Bujqësore Kamez	Tiranë, Kamëz	368	93
Sali Ceka	Elbasan	274	69
Tregtare	Vlora	305	102
Nazmi Rushiti			19
Total		**3065**	**952**

References:

https://eurydice.eacea.ec.europa.eu/national-education-systems/albania/overview
https://qbz.gov.al/eli/ligj/2017/02/16/15-2017
https://www.unitir.edu.al/images/dokumenta/Legjislacion/Ligj_80-2015_22.07.2015.pdf
https://ualbania.al/pages/universitetet.html
https://qbz.gov.al/eli/ligj/2017/02/16/15-2017
National Education Strategy (https://arsimi.gov.al/wp-content/uploads/2021/05/Draft-Strategjia-per-Arsimin-2021-2026-1.pdf
DIHA and F. Erbert Stiftug, "VOCATIONAL EDUCATION & TRAINING IN ALBANIA
Companies ask for better skilled workforce in Albania' (see https://www.diha.al/fileadmin/user_upload/PDF-Unterlagen/Konjunkturumfragen/Report_on_Poll_Results_-_EN.pdf
REVIEW OF THE REGULATORY FRAMEWORK AND PROVISION OF POST-SECONDARY AND HIGHER VET IN ALBANIA, January 2022, (see https://www.undp.org/sites/g/files/zskgke326/files/2022-05/Review%20of%20the%20Regulatory%20Framework%20and%20Provision%20of%20Post-Secondary%20and%20Higher%20VET%20in%20Albania.pdf
Review of Albania's Vocational Education and Training System, including a comparative analysis with selected countries from Central and Western Europe and the Balkan Region May 2020, Author Ms. Annett Hilpert, published with the assistance of the Swiss Development Cooperation, through the Skills Development for Employment – Consolidation Phase – Programme, implemented by UNDP Albania, https://www.undp.org/sites/g/files/zskgke326/files/2022-06/VET%20English%20Online_Oct%202%5B1%5D%5B26%5D.pdf
COUNTRY BRIEF – ALBANIA, Integrated monitoring process of the EU Council Recommendation on VET and the Osnabruck Declaration, Training Foundation, 2022

2.2 Education System in Kosovo

Vocational Education and Training (VET) mapping in Kosovo, especially in the tourism industry, entails a thorough examination of the current VET system, its fit with labor market demands, the obstacles encountered, and the areas that could be improved to develop a workforce with the necessary skills to support the industry's expansion.

1.   Identifying Key Stakeholders

Important parties involved in Kosovo's VET tourism sector include employers, learners, and industry groups, government agencies in charge of tourism and education, and vocational training facilities. However, VET institutions struggle to offer high-quality education, mostly because of insufficient funding, despite policy plans aimed at improving the vocational education sector. The needs for practical training, which are essential for the tourist industry, are not sufficiently taken into consideration by the financing mechanisms for VET institutions. Although legislation allows vocational schools to seek additional revenue by activities outside public funding or through contributions and gifts, the financing formula for education does not account for the characteristics of VET. It is vital to go forward by streamlining bureaucratic processes for generating money and supporting VET institutions in their endeavors.

2.   Understanding of VET Framework

 The current status of Kosovo's VET framework demonstrates that the system is set up using specialized profiles to meet the demands of the labor market. However, throughout the research, there is a need to update the VET programs to reflect changes in the job market and economy.

Public-private collaborations, which are essential for maximizing the VET offer and incorporating work experience into education, present opportunities to improve the VET system. Initiatives like the formation of collaboration between businesses and VET institutions to enhance students' practical learning capabilities have been made possible by such partnerships. The KSV/020 project[16], which is jointly supported by the Grand Duchy of Luxembourg and the Government of Kosovo, is a noteworthy endeavor in this respect. Its goal is to reinforce and restructure the governance framework of the VET system in Kosovo. This initiative has made it easier for students to gain professional experience in businesses and promoted the implementation of certification sets created in collaboration with private sector partners in Europe, fusing academic knowledge with employable skills.

Even with these attempts, problems like VET schools that specialize on profiles that don't fit market demands because thorough study and research weren't done before making decisions still exist. Two major areas that still require improvement are the execution of strategic papers and the revision of VET courses to better correspond with the job market. The incorporation of novel technical methodologies, such as the utilization of Arduino Kits for projects, has demonstrated encouraging advancements in augmenting students' practical skills.

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[16] https://luxdev.lu/en/activities/project/KSV/020

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In order to lower young unemployment and promote economic growth, it is imperative to develop a more resilient and industry-aligned VET system, which may be built upon the present partnerships and efforts.

3. Gathering Data on VET Providers

VET provider Name	Location	Contact Information: Email/Phone
SHML 7SHTATORI	PRISHTINE	Musli.d@outlook.com
SHME ,, ALI HADRI,,	PEJË	koordinatori.shme@gmail.com
Faculty of Management in Tourism, Hospitality and Environment - "Haxhi Zeka"	Pejë	bedri.millaku@unhz.eu

4.   Curriculum Analysis

A thorough approach to vocational education in Kosovo is revealed by the analysis of the Learning: Outcomes, Curriculum Structure and Courses, Practical Training Components, Industry Alignment, Technology Integration, and Student Support Services across the three curricula for culinary arts ('Kuzhinjer'), tourism and hospitality management, and "Asistent i Mikpritjes Hoteliere" (Assistant in Hotel Hospitality).

The emphasis of all three curricula is on equipping students with applicable information and real-world skills for the workforce. Their objective is to develop professionals who possess extensive knowledge of culinary arts, hospitality in hotels, and tourist goods and services. As a result of the established learning goals' alignment with industry demands, students graduate from their courses prepared for the workforce.

The courses show how to strike a balance between core knowledge and specific technical abilities. A holistic educational approach is supported by the inclusion of professional courses like culinary and basic tourism as well as general education topics like languages and math's. In order to prepare students for real-world situations, the framework demonstrates a clear transition from theoretical foundations to specialized practical applications.

All programs place a high priority on practical training, including industrial placements, internships, and on-the-job training. For students to obtain personal experience and close the knowledge gap between academic study and real-world application, this kind of exposure is essential. The cooperation of the industry in offering these chances points to an integrated approach to vocational education.

In order to guarantee that the skills taught are in demand, industry stakeholders are included in the curriculum design process. The programs make sure that the education given stays relevant and satisfies both present and future market demands by integrating specialists from the industry in curriculum creation and upgrading.

Although conducting research online is mentioned, it would be advantageous to use more specialized technology for hospitality and tourist management. The degree and efficacy of this kind of integration are

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crucial components of contemporary vocational education and have the potential to significantly improve the educational process.

The curriculum advocate for a dedication to skill development and lifelong learning. The existence of procedures for continual development and quality assurance indicates that the educational system is flexible and sensitive to shifting industrial demands and academic standards.

The tourism and hospitality industry's VET programs in Kosovo demonstrate a dedication to offering thorough, practically-based, industry-aligned education. They train students for entry-level jobs and industry career advancement. But in order to keep these programs effective, ongoing assessment and revisions that take into account the newest developments in technology, trends, and partner industry input are required.

2.2.1. Curriculum framework for Tourism sector

CURRICULUM FRAMEWORK 1

Program Title: Chef

Program Code: N/A

Program Duration: THREE YEARS KL.10.11.12

Target Audience: All students who have completed primary education up to the age of 17 can follow the Chef/Kuzhinjer course. Lessons for adults after the age of 17 with accelerated learning are also available.

Program Description: Culinary management training develops professional competencies in theoretical and practical learning according to the Dual system. Qualifies students as chefs, preparing them for immediate employment.

Learning Outcomes: List the specific learning outcomes that learners are expected to achieve upon completing the program. Ensure that these outcomes are clear, measurable, and aligned with industry needs.

1. Chef level I and II
2. Kitchen assistant
3. Employment in hotel enterprises starting from grade 11 in accordance with labor law

Program Structure and Sequence: Outline the structure of the program, including the sequence of courses/modules that learners will undertake. Describe any core or elective components and any prerequisites.

> **Teaching Plan for Professional Education ....(Hospitality and Tourism),**
>
> **Level III or IV.**

No.	Code	Courses and learning modules	Weekly/annual hours
			Class... 13
A.		General subjects (in total)	
1		English	
2		German	
3		French	
4		Mathematics	
5		Physical Education	
B.		Professional Subjects (in total)	
1		Basics of Tourism	
2		Food Commodity Knowledge	
3		Biology with Hygiene	
4		Basics of Hotel Service	
5		Poultry Farming	
C.		Compulsory professional practice modules (in Total)	
1		Courtesy and Hygiene	
2		Familiarity with Kitchen Departments	
3		Basics of Cooking, Types of Meat	
4		Breakfast Preparation and its Types	
5		Vegetable Preparation	
6		Preparation of Vegetarian Dishes	
		Total A+B+C	

Practical Training Components: All students carry out practical training in schools and tourist hotel enterprises. Enterprises offer engagement in the hospitality industry for practice and compensate students according to the contract with the school.

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Industry Engagement: The program actively collaborates with the tourism and hospitality industry to ensure that the curriculum is industry-relevant and up-to-date. Partnerships with local hotels, restaurants, and culinary associations are integral, providing students with essential work placements and apprenticeships.

Industry-Relevant Skills: The Chef program aims to cultivate a wide array of skills that are crucial for culinary and hospitality professionals, including:

Culinary Expertise: Mastery in various cooking techniques, ingredient selection, and recipe development.

Customer Service: Developing interpersonal skills, understanding customer needs, and providing high-quality service.

Food Safety and Hygiene: Implementing food safety regulations and maintaining hygiene standards in the kitchen and dining areas.

Marketing: Basics of marketing to understand how to promote culinary services and products.

Alignment with Industry Needs: The Chef program is closely aligned with the evolving needs of the tourism and hospitality industry. It incorporates emerging trends such as farm-to-table concepts, the use of organic and locally sourced ingredients, and the growing emphasis on health-conscious menus. The curriculum is updated regularly in consultation with industry partners to include modern culinary techniques, the latest health and safety standards.

Employment opportunities: …………………………………….

Technology Integration: The Chef program tries to integrated technology to enhance the educational experience and ensure students are adept with tools relevant to the modern culinary field.

Student Support Services: The Chef program provides a range of support services designed to assist learners in their academic journey and career preparation, including: Dedicated advisors help students navigate the curriculum, select the right modules, and provide guidance on managing academic challenges as well as professional career counselors offer advice on potential career paths, help students understand industry expectations, and prepare for the job market.

Continuous Improvement Mechanism: Regular meetings with stakeholders, including students, alumni, employers, and faculty, are held to discuss the program's progress and areas for improvement. These meetings serve as a platform for transparent communication and collaborative decision-making.

Best Practices and Benchmarking: The Chef program incorporates several best practices and benchmarks from successful tourism-related VET programs globally. The curriculum is designed in alignment with international culinary standards, adopting best practices from renowned culinary schools.

CURRICULUM FRAMEWORK 2

Program Title: Hospitality Assistant

Program Code:

Program Duration: Three years

Target Audience: Education in the 'Hospitality Assistant' profile, can be attended by all young men and women who have successfully completed nine years of compulsory education, and are no older than 17 years old. As an exception, persons up to 24 years of age can register for higher professional secondary education programs, with the approval of the school's Teachers' Council, in accordance with the provisions of the Ministry of Education, which regulate the conditions and criteria for the registration of students in secondary vocational schools.

In special cases, when the requirements to follow this education are higher than the real capacities of vocational schools, the Ministry of Education prepares special instructions with special admission criteria for these schools.

Program Description: Following education in the 'Hospitality Assistant' profile, will develop in the student a set of professional competencies, which will serve him for further education and professional training, as well as for successful employment in the relevant services:

- Assistant jobs at the counter, in bars, in canteens (hospitals, retail, dormitories, in hospitals, military canteens/restaurants), in pastry shops
- Auxiliary jobs in the hotel service, in the restaurant and banquet halls
- Auxiliary jobs in gastronomy, in kitchens and pastry shops of hotels and restaurants, of social food kitchens (hospitals, retail, dormitories, in hospitals, military kitchens), as well as restaurants and individual pastry shops, as a basic business.

Learning Outcomes: Based on this, the student who successfully completes the education in the 'Hospitality Assistant' profile, level I and II, can be employed as an assistant in hospitality enterprises, in positions that perform assistance functions, related to hotel services and of the restaurant, including jobs:

1. In hotel services within hotel facilities, in restaurant halls, banquet halls, in bars, terraces, gardens, swimming pools, and pastry shops in hotels
2. In services in independent facilities, such as restaurants, bars, cafeterias, corners, buffets
3. In the catering or food services of workers in corporations
4. In catering services - institutional or subsidiary food (food in schools, universities and colleges, food in hospitals, food in military canteens, in prisons and in care homes - the elderly, special health care and for asylum seekers)
5. In services in commercial or retail establishments (restaurants in Hypermarkets),
6. In food and beverage services in tourist transport (planes, trains and ships)
7. In the food and beverage services within the catering services, outside the basic facilities.

Program Structure and Sequence: The student will gain proficiency in:

- Utilizing and maintaining service tools and inventory.
- Conducting pre-service preparations in restaurants.
- Arranging and setting tables according to reservations and menus.
- Preparing service stations and assisting in food service.
- Differentiating various hotel service systems, including French, English, Viennese, Anglo-American, and Russian styles.

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- Assisting in catering services and food service organization in social canteens and tourist transport (planes, trains, ships).
- Welcoming customers and managing drink orders and service.
- Handling various tasks at the counter, including preparing and serving drinks.
- Assisting in the preparation of basic sauces, cold antipasti, soups, fish, and meat dishes, as well as vegetarian starters and garnishes.
- Developing basic dish and dessert recipes, and fruit salads.
- Supporting marketing efforts and upholding hygiene, safety, and confidentiality standards.
- These skills prepare students for comprehensive service roles in the hospitality industry.

Teaching Plan for Professional Education ……….(Hospitality and Tourism), Level III or IV					
No.	Code	Courses and learning modules	Weekly/annual hours		
			Class... 10	Class 11	Class 12
A.		General subjects (in total)			
1		Albanian language and literature	10	9	10
2		English language	10	9	10
3		German language	10	9	10
4		Mathematics	10	9	10
5		Civic education	10	9	10
6		Physical education and health	10	9	10
B		Professional Subjects (in total)	Class... 10	Class 11	Class 12
1		Information Technology and Communication	16	14	10
2		Basics of Tourism and Hotel Hospitality	16	14	10
3		Fundamentals of Business in Hotel Hospitality	16	14	10
4		German Language in Tourism	16	14	10

Teaching Plan for Professional Education ………(Hospitality and Tourism), Level III or IV					
No.	Code	Courses and learning modules	Weekly/annual hours		
			Class... 10	Class 11	Class 12
5		Code of Conduct and Professional Hospitality	16	14	10
6		Knowledge of Goods and Inventory	16	14	10
7		Tourist Geography	16	14	10
8		Basics of Accounting	16	14	10
9		Work Processes in Hotel Hospitality 10	16	14	10
10		Hygiene and Food Safety Fundamentals	16	14	10
11		Basics of Marketing	16	14	10
12		Basics of Gastronomy I and II	16	14	10
13		Organization of Hotel Enterprises I and II	16	14	10
14		Basics of Food Technology	16	14	10
15		Work Processes in Hotel Hospitality 11	16	14	10
16		Communication in Hospitality	16	14	10
17		Work Processes in Hotel Hospitality 12	16	14	10
18		Elective Subjects (as per school's choice)	16	14	10
C.		Compulsory professional practice modules (in Total)			
		Total A+B+C			

Practical Training Components: The "Hospitality Assistant " program offers practical training opportunities designed to complement the theoretical knowledge acquired in the classroom. These include participation in real-world projects, including event management and catering services, to develop teamwork and project management skills.

Industry Engagement: The "Hospitality Assistant" program engages closely with the tourism industry through collaborations with local hotels, restaurants, and hospitality businesses.

Industry-Relevant Skills: The "Hospitality Assistant " program is designed to develop vital skills for the hospitality sector.

Alignment with Industry Needs: The "Hospitality Assistant " program focuses on developing key skills such as customer service, event Management etc

Employment opportunities: Graduates of the "Hospitality Assistant " program have diverse employment opportunities in the tourism and hospitality sector

Technology Integration: We use some digital resources

Student Support Services:

The program offers extensive support services to students. This includes academic advising, where advisors are on hand to help students with course selection, academic planning. Additionally, career counseling is provided, where professional career counselors guide students on potential career paths in the hospitality industry, assist with resume building, and prepare them for job interviews, ensuring they are well-equipped for their future careers.

Continuous Improvement Mechanism: program utilizes a continuous improvement mechanism to stay current and effective. Feedback is regularly collected from students, industry partners, and other stakeholders.

Best Practices and Benchmarking: Key aspects include strong industry collaboration, a focus on practical training. The program emphasizes sustainable practices and conducts regular curriculum reviews based on industry feedback.

CURRICULUM FRAMEWORK 3

Program Title: Management in Tourism, hospitality and environment **Program Code:** Higher education – First Cycle of Bologna Bachelor Level 6	
Program Duration: Three years **Target Audience:** 50 students **Program Description:** The Tourist Region of Peja has great potential for the development of tourism, according to the fact that the city is surrounded by mountains that make this place unique, therefore the program is focused on tourism and hospitality **Learning Outcomes:**	
1. Preparation of tourism experts 2. Knowing and preparing the tourist product 3. Students prepare for the job market	
Program Structure and Sequence: .	

FIRST YEAR winter semester					
Semestri I			**Orë/javë**		
Nr	**O/Z**	**SUBJECTS**	**L**	**U**	**ECTS**

1	O	Management	2	2	6
2	O	Introduction to tourism	2	2	6
3	O	Mathematics for tourism	2	2	6
4	O	Microeconomics	2	2	6
5	O	Business basics in tourism and hospitality	2	2	6
		Total	**10**	**10**	**30**

First year, spring II semester					
Nr.	**O/Z**	**SUBJECTS**	**L**	**U**	**ECTS**
1	O	Informatics	2	2	6
2	O	Macroeconomics	2	2	6
3	O	Academic writing	2	2	6
4	O	Introduction to statistics	2	2	6
5	O	Accounting	2	2	6
		Total	**10**	**10**	**30**

Second year III winter semester					
Semester III					
Nr.	**O/Z**	**SUBJECTS**	**L**	**E**	**ECTS**
1	O	Business law		2	6
2	O	Food and beverage management	2	2	6
3	O	Finances in tourism	2	2	6

4	O	Cultural heritage in tourism	2	2	6
5	O	Tourism travel marketing	2	2	6
		Total	**10**	**10**	**6**

Second year IV spring semester

Nr.	O/Z	SUBJECTS	L	U	ECTS
1	O	Taxes and corporations	2	2	6
2	O	Entrepreneurship	2	2	6
3	O	Human resource Management/	2	2	6
4	O	Financial analysis in tourism	2	2	6
5	O	English language 1	2	2	6
		Total	**10**	**10**	**30**

THIRD YEAR V winter semester

Nr.	O/Z	SUBJECTS	L	U	ECTS
1	O	Management of tourist trips	2	2	**6**
2	O	Economy of tourism and business	2	2	**6**
3	O	Practical learning	0	2	**6**
4	O	Development of products in tourism and hospitality	2	2	**6**
5	Z	Tourism and hotel management	2	2	**6**

6	Z	Business environment in tourism	2	2	**6**
7	Z	English language 2	2	2	**6**
		Total	14	14	42

Third year, VI spring semester

Nr.	O/Z	SUBJECTS	L	U	ECTS
1	O	Sustainable tourism	2	2	**6**
2	O	International tourism	2	2	**6**
3	O	Theses (Diploma Thesis)	4	4	**8**
4	Z	Tourist agencies	2	2	**6**
5	Z	Tourism market research	2	2	**6**
6	Z	Electronic business in tourism	2	2	**6**
		Total	14	14	36

Tourism module Semester VI			Hour-Week		
No.	**O**	**SUBJECTS**	**L**	**U**	**ECTS**
1.	**O**	**Tourist market**	**2**	**2**	**5**
2.	**O**	**Tourism economy and business**	**2**	**2**	**5**
3.	**O**	**Tourist product**	**2**	**2**	**5**
4.	**O**	**Thesis (Thesis)**	**2**	**0**	**10**
5.	**Mr.**	**Tourist agencies**	**2**	**2**	**5**
6	**Mr.**	**Information systems and reservations in travel agencies**	**2**	**2**	**5**

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		TOTAL			30/180 ETC

Year III

Hospitality module Semester VI			Hour-Week		
No.	O	SUBJECTS	L	U	ECTS
1.	O	**The hotel industry**	2	2	5
2.	O	**Food sciences**	2	2	5
3.	O	**Hotel business**	2	2	5
4.	O	Thesis (Thesis)	2	0	10
5.	Mr.	**Customer services in hotels**	2	2	5
6.	Mr.	**Information systems and hotel reservations**			5
		TOTAL			30/180 ETC

Year III

Environment Module Semester VI			Hour-Week		
No.	O	SUBJECTS	L	U	ECTS
1.	O	**Integrated management of water resources**	2	2	5
2.	O	**Pollution and soil protection**	2	2	5
3.	O	**Research methods**	2	2	5
4.	O	Thesis (Thesis)	2	0	10
5.	Mr.	**Treatment of (Micro)pollutants in soil and wastewater systems**	2	2	5

6.	Mr.	**Introduction to environmental technology**	2	2	5
		TOTAL			**30/180 ETC**

Practical Training Components: Internship is held in hospitality and tourism organizations

Industry Engagement: We cooperate with the Industrial Board

Industry-Relevant Skills: Professional staff for the tourism and hotel industry are being trained

Alignment with Industry Needs: The data for the framework is provided by the industry. This is how we prepare cadres for the industry

Employment opportunities: The students we train are then employed in the hotel and tourism industry

Technology Integration: The Internet is used for data and research

Student Support Services: We always offer assistance during training for students as well as advise them regarding the ambiguities they may encounter

Continuous Improvement Mechanism: We have a special office for quality, always with the aim of the best possible preparation

Best Practices and Benchmarking: The programs are always compared and we take the most suitable ones from a professional point of view

5.   **Mapping Course Offerings:**

Following is a matrix to map Vocational Education and Training (VET) courses offered by various institutions in Kosovo against targeted sectors within the tourism industry. The aim is to highlight the diversity and availability of these programs and their alignment with specific tourism sectors, providing insights for stakeholders in education and industry planning.

VET Provider	Course Offerings	Targeted Tourism Sector
SHML 7 SHTATORI	Culinary Arts ('Kuzhinjer')	Culinary/Hospitality
SHME,, ALI HADRI,,	"Asistent i Mikpritjes Hoteliere" (Hospitality Assistant)	Hospitality/Hotel Services
Fakulteti i Menaxhimit në Turizëm, Hoteleri dhe Mjedis	Tourism and Hospitality Management	Tourism Management/Environmental Tourism

The resulting matrix (Table 1) illustrates the alignment of VET courses with targeted tourism sectors in Kosovo. Three main VET providers were identified: SHML 7SHTATORI, SHME, ALI HADRI,," and Fakulteti I Menaxhimit në Turizëm, Hoteleri dhe Mjedis. Their courses were mapped against relevant tourism sectors like Culinary/Hospitality, Hospitality/Hotel Services, and Tourism Management/Environmental Tourism.

The courses range from culinary arts, focusing on the culinary and hospitality sector, to more comprehensive programs like tourism and hospitality management, addressing broader management roles in tourism.

6.   **Industry Collaboration:** Investigating how VET providers collaborate with the tourism industry to develop their curriculum, offer work placements, and facilitate internships. Assessing the level of industry involvement in shaping the training programs.

In Kosovo, the tourism industry is a vital sector demanding skilled professionals. VET providers play a significant role in preparing students for this industry. Effective industry collaboration is crucial for ensuring that these programs meet the real-world demands of the tourism sector.

The analysis revealed varying degrees of industry collaboration across the three VET providers:

- SHML 7SHTATORI (Culinary Arts): The curriculum includes industry engagement primarily through local culinary businesses for internships and practical training.

- SHME ,, ALI HADRI,, (Hospitality Assistant): This program demonstrated strong industry ties, with partnerships for practical training in hotel and hospitality services.

- Fakulteti I Menaxhimit në Turizëm, Hoteleri dhe Mjedis (Tourism and Hospitality Management): Collaboration is evident in the form of partnership with local tourism businesses and environmental organizations.

Industry collaboration in Kosovo's VET programs for tourism is present but can be enhanced. Strengthening these collaborations could lead to more industry-relevant curricula, better training opportunities, and more effective preparation of students for the tourism workforce. Ongoing engagement with industry stakeholders is recommended to ensure that VET programs remain responsive to the dynamic needs of the tourism sector.

2.3 Education System in Macedonia

Mapping Vocational Education and Training (VET) in the tourism industry involves understanding the various components of the VET system and how they relate to the tourism sector. Here's a step-by-step guide on how to perform VET tourism mapping:

1. **Identifying Key Stakeholders:** Determining the key stakeholders involved in the VET tourism sector, such as vocational training institutions, tourism industry associations, employers, learners, and government agencies responsible for education and tourism.

2. **Understanding of VET Framework:** The national or regional VET and dual training system framework and its governing policies and regulations related to tourism. Specify the governmental measures to attract students to VET education. Identifying the specific qualifications, certifications, and competency standards relevant to the tourism industry. Also, provide a diagram about education and training structure in the Country.

3. **Gathering Data on VET Providers:** Compiling a list of VET providers that offer Hospitality and Tourism related courses and programs. This includes vocational schools, online training platforms, etc.

VET provider Name	Location	Contact Information: [Email/Phone]
SUGS Lazar Tanev	Skopje	info@lazartanev.edu.mk
OUTP Vanco Pitoshevski	Ohrid	pitoseski@yahoo.com
SOU Naum Naumovski Borche	Krusevo	nnborce@gmail.com
SOU Kole Nehtenin	Shtip	kontakt@kolenehtenin.edu.mk
SOU Josif Josifovski	Gevgelija	soujj@josifjosifovski.edu.mk
SOU Gjorce Petrov	Kriva Palanka	sougorcepetrov@yahoo.com
SOU Taki Daskalo	Bitola	takidaskalobitola@gmail.com
SOU Niko Nestor	Struga	sounikonestor@gmail.com
SSOU Kole Nedelkovski	Veles	kolenedelkovski@yahoo.com
SSOU Mosha Pijade	Tetovo	mosapijedi@t-home.mk
SV.Naum Ohridski	Makedonski Brod	naumbrod@t.mk
SABA - Academy for Business Administration	Skopje	info@saba.edu.mk
OSU Aco Ruskovski	Berovo	aruskovski@yahoo.com

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VET provider Name	Location	Contact Information: [Email/Phone]
Faculty of tourism and organizational studies	Ohrid	ftu@uklo.edu.mk
UTMS	Skopje	contact@utms.edu.mk
Faculty of tourism and business loggistics	Stip	biljana.conevska@ugd.edu.mk
Agency for promotion and support of tourism	Skopje	info@tourismmacedonia.gov.mk
HOTAM	Ohrid	hotam.contact@gmail.com
OGUDU Kocho Racin	Skopje	ruracin1@t.mk
KONCEPT Institute	Skopje	institut@koncept.com.mk
FJ Culinary Consultants	Skopje	info@fj-culinaryconsultants.com
KOUZON Fire Academy	Skopje	info@kouzon.com.mk
REGENT Hospitality Consulting	Skopje	info@regent.mk

4. **Curriculum Analysis:** Reviewing the curriculum of tourism-related VET programs requires a structured framework to systematically assess the courses offered, learning outcomes, practical training components, and alignment with industry needs.

2.3.1. Curriculum framework for Tourism sector

The " Hospitality and Tourism " program offered by schools in North Macedonia has a structure 3+1.

Successful completion of the " Hospitality and Tourism " professional qualification (three years) at Level III of the Qualification of Hospitality and Tourism Services (QHTS) equips the student with a partially qualified worker's certificate (vocational diploma) in this field, with the right to continue education at Level IV of QHTS for professional qualification (one year), in one of the teaching profiles of this program:

1.   Hotel and restaurant technician

2.   Hotel and tourism technician

3.   Event and animation technician

4.   Catering technician

5.   Rural tourism hospitality technician

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Successful completion of vocational education in the " Hospitality and Tourism " program at Level IV of QHTS provides the student with a Diploma of State Vocational Education, as well as a Technician's Certificate in the field of hotel and tourism. This qualification enables the student to enter the job market for employment in the accommodation sector, food and beverage businesses, travel agencies, and tourist agencies, as well as in all sectors and businesses offering accommodation, food, beverages, entertainment, and events services. With the completion of this level, the student has the opportunity to pursue further education at the post-secondary or university level.

Here's a comprehensive framework to guide the evaluation process:

Program Title: Hospitality -Tourism

Program Code:

Program Duration: 1 year/ LEVEL 4

Target Audience:

The admission requirements for students in vocational education in the "Hospitality and Tourism" program, Level IV of the Qualification of Hotel and Tourism Services (QHTS). In schools that offer vocational education in the 'Hospitality and Tourism' program, Level IV of the Qualification of Hotel and Tourism Services (QHTS), all young individuals have the right to enroll who:
      have completed vocational education in one of the teaching profiles at Level III of the "Hospitality and Tourism" program;
      They must be physically and mentally capable of meeting the requirements of this level of vocational education.
      For those with limited abilities, the school creates conditions and adapts the program in accordance with their disabilities.;

Description of the program through work at an employer:

The aim of the curriculum for Hospitality and tourism is for the student to acquire knowledge, skills and competences for:
- describing the structure and organization of a work organization, connecting theory and practice in a real workplace
- work and employability
- performing simple work tasks in the area of hotel restaurant operations
- serving and serving main, side, extra and customized meals; identifying work activities during boarding service;
- application in practice of providing boarding services;
- application of floor service methods, correctly serves and serves guests' rooms; explaining envelopes for special dishes;
- organizing all kinds of formal receptions;
- serving different types of formal receptions and other catering events and manifestations;
- demonstrating ways of preparing and finishing dishes in front of guests;
- using crediting and billing methods;

- performance of work and tasks in the accommodation part of the hotel during the guests' stay;
- performance of work and tasks in the accommodation part of the hotel upon departure of the guests; the types and organization of animation content in a hotel;
- tourist satisfaction as a measure of quality in hospitality; the characteristics and specificities of procurement and sales in a hotel; calculating the calculation and price of accommodation facilities in a hotel;

Learning Outcomes:

The main outcomes of the Hospitality/Tourism program are to equip the students with the following knowledge, skills and competences:

- to interpret types of animation content in the hotel
- to be able to qualify divisions of animation content in the hotel
- to organize animation content in the hotel
- explanation of international gastronomy and its significance for tourism; classification of modern tendencies in gastronomy;
- - interpretation of supply and demand of gastronomic products and services; identifying international organizations related to gastronomy;
- - distinguishing the regional characteristics of gastronomy in the world.
- describing types of boarding services;
- identifying work activities during boarding service;
- application of floor service methods, correctly serves and serves guests' rooms; explaining envelopes for special dishes;
- organizing all kinds of formal receptions;
- serving different types of formal receptions and other catering events and manifestations;
- demonstrating ways of preparing and finishing dishes in front of guests;
- enumeration of crediting and collection methods;
- billing using modern billing systems; developing principles for sustainable development in hospitality.
- describing the structure and organization of a work organization, connecting theory and practice in a real workplace
- work and employability
- performing simple work tasks in the field of hotel restaurant operations serving and serving main, side, extraordinary and customized meals; identifying work activities during boarding service;
- application in practice of providing boarding services;
- application of floor service methods, correctly serves and serves guests' rooms; explaining envelopes for special dishes;
- organizing all kinds of formal receptions;
- serving different types of formal receptions and other catering events and manifestations;
- demonstrating ways of preparing and finishing dishes in front of guests;
- using crediting and billing methods;
- performance of work and tasks in the accommodation part of the hotel during the guests' stay;
- performance of work and tasks in the accommodation part of the hotel upon departure of the guests; the types and organization of animation content in a hotel;
- tourist satisfaction as a measure of quality in hospitality; the characteristics and specificities of procurement and sales in a hotel; calculating the calculation and price of accommodation facilities in a hotel;

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Program Structure and Sequence:

No	Code	Courses and learning modules	Weekly/annual hours Class... 9/231
Teaching Plan for Professional Education (Hospitality and Tourism), Level IV.			
A		General subjects (in total)	
1		Macedonian Language and literature	3
2		English Language	2
3		Sport and sport activities	2
4		Second foreign language	2
B.		Compulsory professional practice modules (in Total)	4 (66)
1		Entrepreneurship and Innovation	2
2		Agency work	1
3		Hotel work	1
4		Tourist destinations	2
C.		Practice work and exercises (in Total)	6 (198)
D.		Optional Subjects	
1		Tourist Guidance	2
2		Events management	2
		Sustainable development of tourism	2
		Culinary basics	2
		Maths	2
E.		Practical Education	198
		Learning by working at an employee	6
		Total A+B+C	**30/31** (960/ 992)

Practical Training Components:

The curriculum in the subject of practical training is implemented through demonstrating, simulating and performing practical operations, exercises, practical tasks in offices according to agency and hotel operations. In order to obtain successful acquisition of knowledge and skills related to the psychomotor and psychosocial component, during the organization and implementation of teaching in this subject, certain practical activities should be carried out in

appropriate enterprises from tourism and hospitality. At the same time, it is necessary to implement the teaching in block classes for exercises for students in groups, pairs and individually.

"Study smart, work professionally" is a campaign implemented by the Ministry of education and science of North Macedonia with the support of the Swiss Agency for Development and Cooperation.
The goal is the promotion and advancement of secondary vocational education and training, and everything based on the needs of the real sector from the opening of dual classes in secondary vocational schools.

Dual education implies the realization of practical work in renowned companies with which the school has signed a memorandum of cooperation. The companies that are involved in the dual education program enable students to realize practical teaching with trained mentors in real working conditions, and in cooperation with the teachers of practical teaching.

For teachers this is an opportunity for professional development and is very significant because
Thus, they are improving the educational process as a whole. Students acquire and improve practical skills with which they will be competitive in the labor market.

This system provides them with an education that guarantees their employment in the companies in which the practical training was carried out. Of course, there is also a possibility of opening your own business and continuing your education, all depending on the desire of the student.
This new concept of education provides students with the opportunity to receive a scholarship from the Ministry of Education and Culture. In addition, there is a possibility of obtaining a scholarship from the companies in which the practical teaching is carried out.

Industry Engagement:

Although the cooperation with employers during the last years has increased, it is not enough, if we are talking about quality functional professional education and training. According to the data taken from the Center for Vocational Education and training, for the academic year 2019/2020, in the four-year technical vocational education, in the process of the realization of practical training includes 887 companies that provide practical training 8,876 students out of a total of 37,140 enrolled students. The remaining 28,264 students carry out the practical training at the school, without the possibility of going to an employer.

The dual education system obliges the student to have 6 classes or one day practical work at the school or at the employer through the whole year.

Alignment with Industry Needs:

From the perspective of employers, there is a need to balance between government policies, labor and resource availability. Having in mind that the rate of survival of enterprises in the tourism activity is relatively unattractive, investment in education and skills is possible represent the most reasonable option for business owners in order to improve the longevity of enterprises and create more opportunities for job creation. Accordingly, the quality of the workforce has an important role in increasing productivity, competitiveness and profitability.

The Chamber of Commerce of North Macedonia plays an Important role in connecting the business sector with the education system. Through the Center for Dual Education, the focus of their engagement is

encouraging companies to transform and shape their staff by including in the dual model of education and networking with professional schools for the realization of dual education and learning through work. In addition, their engagement focuses on quality assurance in the realization of dual education and learning through work with the training of mentors in companies and verification of companies for practical training of students.

Employment opportunities:

Successful completion of vocational education in the "Hospitality and Tourism" program, Level IV of the Qualification of Hotel and Tourism Services (QHTS), equips the student with the Diploma of State Vocational Maturity, as well as the Manager's Certificate in the field of hospitality and tourism. This qualification provides the student with the opportunity to enter the job market for employment in the accommodation sector, food and beverage businesses, travel agencies, and tourist agencies, as well as in all sectors and businesses offering accommodation, food, beverages, entertainment, and event services. With the completion of this level, the student has the possibility to pursue further education at the post-secondary or university level.

The ratio of employees / enterprises shows that in the accommodation and food service activities there is an average of 5,08 employees per company. The average for the Republic of Macedonia is 9.48 employees per enterprise. All services have a lower average employee per enterprise than the level of the Republic of Macedonia. This is confirmed by the fact that from the point of view of the number of employees, the dominant part of service enterprises are small business companies.

Technology Integration:

The Europeana MOOC "Digital Education with Cultural Heritage" explores the educational potential of digital cultural heritage and prepares the students to implement it using digital technologies.

This MOOC uses Europeana's digitized collection of cultural heritage and content from the Teaching with Europeana blog. Through it, participants are introduced to a multitude of resources in multiple formats (such as images, videos, texts, 3D) and multiple languages and various tools such as Transcribathon, Historiana and other ready-made materials that they can easily integrate into their educational activities, including and STEM classes. In addition, the course will introduce the learning scenario template and guide participants in using it and building their own.

Student Support Services: The school offers the student support services available to learners, such as academic advising, career counseling, and assistance with job placements.

Continuous Improvement Mechanism: The school collect feedback from learners, industry partners, and other stakeholders, and this feedback help for continuous improvement of teaching and program curriculum

Best Practices and Benchmarking:

"Learn Smart, Work Skillfully" is a campaign implemented by the Ministry of Education and Science with the support of the Swiss Agency for Development and Cooperation, with the objective to promote and advance secondary vocational education and training.

The campaign is carried out through 1) Social dialogue or consultations with companies, chambers of commerce and local governments on the need to open new profiles/classes in secondary vocational schools across the country. The consultations are led by representatives of the Government, the Ministry of Education and Science, Mayors, companies and vocational schools, to discuss the needs of the real sector for opening dual classes in secondary vocational schools, new curricula and new enrollment policies in secondary vocational schools.

The social dialogue or consultations are carried out after conducting an analysis that defines a clear picture of the existing profiles offered by the schools, their compliance with the needs of the companies and the readiness for cooperation of the companies with the secondary vocational schools at local level. In 2021, 450 companies from all over the country participated in the analysis of the Ministry of Education and Science, of which 85% stated that they are ready to cooperate with secondary vocational schools and to accept students for practical training, in order to create professional and quality staff.

"Learn Smart, Work Skillfully" is also carried out through 2) Open days in secondary vocational schools, with the objective to raise public awareness about secondary vocational education and to emphasize the importance of vocational education for the national economy. Through the organization of open days in vocational schools in the municipalities, future high school students have the opportunity to get acquainted with a large number of professions offered through vocational education, especially through dual education.

"Learn Smart, Work Skillfully" supports all stakeholders in the education system towards the advancement of vocational education and training in a systematic way, in order for more young people to gain quality vocational education and training that contributes to better and decent employment.

The project **Education for employment in North Macedonia** (E4E@mk) is supported by the Swiss Agency for Development and Cooperation, and is implemented by HELVETAS North Macedonia, the Macedonian Center for Civic Education and the Chamber of Commerce of Macedonia. The main goal of the project is to contribute to more dignified employment of young people (15-29 years old), including vulnerable groups, in a socially inclusive and sustainable way

From 1992 onwards, Switzerland supported the transition processes in North Macedonia. This cooperation is based on the Swiss tradition of solidarity and responsibility, and reflects the importance Switzerland attaches to the stability and prosperity of the Western Balkans. Today, Switzerland is among the largest bilateral cooperation partners of North Macedonia, providing financial support of 69 million euros for the period 2017-2020. The Swiss cooperation program is focused on three priority areas: democratic governance, employment and economic development, and infrastructure and environment.

1. **Mapping Course Offerings: Creating a matrix or chart that maps the VET courses against the targeted tourism sectors. This will help identify the availability and diversity of training programs catering to different areas within the industry.**

Non-formal education of adults is carried out mainly in accordance with the provisions of the Law on Adult Education of the Republic of Macedonia. As providers of adult education services, they can be contacted by public and private institutions for adult education, institutions for adult education, training centers, employers and social partners, citizens' associations or individual trainers, who meet the conditions prescribed by the

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Law. On the official website at the JU Center for Adult Education, the following verified programs and providers of hospitality-tourism training profession can be found:

1. Confectionery Preparer (Open Civil University for lifelong learning Tetovo)
2. Candy maker (DPTU SPECIAL SEMINAR LLC)
3. You make bread and white pastries (DPTU SPECIAL SEMINAR Ltd.)
4. Cook in a catering facility (Education and Training Center "POLYTECHNIC ACADEMY" Bitola)
5. Waiter (Education and Training Center "POLYTECHNIC ACADEMY" Bitola)
6. Cook in a catering establishment (Union of Chambers of Commerce of Macedonia)
7. Waiter in a catering facility (Oreov Lad Restaurant)
8. Waiter gourmet (Bebe - Commerce Academy Steel)
9. Manufacturer of white pastries (Private educational institution – Open civil university for lifelong learning "Vancho Prke" Shtip)
10. Cook in catering facilities (Private educational institution - Open civil university for lifelong learning "Vancho Prke" Shtip)
11. Tourist - agency officer
12. Receptionist
13. Cook of a catering facility
14. Waiter gourmet, Reception, Hospitality, Marketing (HTCA - Hospitality and Training Center Akademik)

The programs in the Chamber of Commerce of Macedonia are certified through the Company for education, catering and services BUSINESS CENTER FOR TRAINING AND TRAINING-OHRID. After completing the training, the participants take a final exam by which they acquire a Certificate accredited by the Ministry of Education of the Republic of Macedonia. The means for financing and developing adult education are provided from the budget of the Republic of Macedonia, from the budgets of the communities of the local self-government, from the participants in the education process of adults and from other sources.

2. **Industry Collaboration: Investigating how VET providers collaborate with the tourism industry to develop their curriculum, offer work placements, and facilitate internships. Assessing the level of industry involvement in shaping the training programs.**

In order to provide opportunities for the student to practically acquire professional, as well as other essential skills, it is appropriate for the practical training to take place in a dual way, i.e. with the necessary presence of real jobs, in addition to school facilities.

However, apart from practical training there are other ways and forms in which employers can significantly contribute to educational processes.

i.   REALIZATION OF THE CURRICULUM AND PRACTICAL TRAINING

   a. Practical teaching is one of the forms of realization of the practical training of students in secondary vocational education. It is realized continuously during the school year according to a prepared program for practical teaching and with the number of hours provided in the curriculum. In the three-year professional education is most often represented in all three years of education of the students, while in the four-year professional education is mostly realized in II, III and IV years of education.

b. The realization is mainly in the school, but a part of it can take place outside from him, that is, in companies.

ii. **FERIAL PRACTICE**

Ferial practice, just like practical teaching, represents the form of practical training of the students in vocational high school education. It is realized after the end of the school year, during the summer vacation, and in accordance with the number of days for ferial practice provided for in the curriculum. Most often that number ranges from 5 to 20 days per year. The realization takes place in a company. After the end of the fair practice, students receive a certificate from the company for successfully performing ferial practice, which is a requirement for their enrollment in the next academic year. It is performed in all classroom years, in accordance with the curriculum plan. The exception is the final year of education.

iii. **LEARNING THROUGH WORK WITH AN EMPLOYER**

Learning by doing represents learning on the job place in a company, craft workshop or in others organizations. It offers the students an opportunity to gain experience in a workplace from real life, which enables them the knowledge acquired in school to connect it with real labor and with future professional and career opportunities. It can be realized within all forms of practical training of students, in accordance with a program that suits them conditions in the company, as well as with the planned goals and results of what should be achieved at the realization of learning through work.

4. OBSERVATION OF THE WORKPLACE/S IN THE COMPANIES

Observation of jobs organizes the school in cooperation with a company. To the student he is allowed to reside in the company in order to observe different jobs that are related to the occupation, i.e. the qualification for which he/she is educated. During the observation, the student records the specifics of the workplace in terms of working conditions, the activities performed by the employee, the tools and equipment he uses during operation, safety procedures etc. The process of observing jobs lasts more than one day, usually from 3 up to 5 days, depending on the number of workplaces.

5. TRAINING OF TEACHERS IN COMPANIES

- The cooperation of the school with the companies in order to train employers has an important role in the professional education and training. She contributes to successful and quality performance of the curricula after professional-theoretical subjects and the practical training. With her knowledge is expanded and competencies are upgraded of the teacher in the vocational school area.

6. CREATION OF PROGRAM DOCUMENTS

- Schools and companies can propose and initiate making different program documents like standards for occupations, qualification standards, curricula in various educational areas, programs for adult education etc. Such programmatic documents should be supported by the respective institutions of

the system, such as MES (Ministry of Education and Science), BDE (Bureau for Development of Education), CVE (Center for Vocational Education and others.

3. **Student Outcomes and Employment Rates:** Collecting data on student outcomes, such as completion rates and employment rates within the tourism industry after completing their VET courses.

The labor market is characterized by overall low activity and employment rates and high unemployment. The latest annual figures available (2019) show an activity rate of around 59.1% in the working age population. The employment rate, although showing a rising trend over the last five years (+6.4%), was just 48.9% in 2019, well behind the EU average. The main factor triggering such poor performances in activity and employment is the gender divide in activity and employment rates, with women showing rates of 21.6 percentage points and 18.7 percentage points, respectively, below their male peers in 2019 (although the gap has been narrowing in recent years). Youth unemployment remains a prominent issue, reaching 35.6% in 2019, one of the highest in the Western Balkans. Also, in this case, there is an historical positive trend which peaked in 2019 when the registered youth unemployment rate (among 15- to 24-year-olds) was 9.8 percentage points lower than the previous year.

A high incidence of unemployment and inactivity, even among those with a medium and high level of education, indicates a problem in matching supply and demand. This is exacerbated by a weak education performance (e.g. PISA results, mismatched education programmes at secondary and tertiary level) and low participation in lifelong learning (according to labour force survey data, only 2.8% of the population engaged in lifelong learning in 2019). The uneven distribution of employment opportunities from a territorial perspective (e.g. regions that are lagging behind) might also explain the coexistence of large swathes of unutilized/underutilized labour potential and skills shortages in the workforce (as claimed by employers).

4. **Identifying Challenges and Gaps: Identifying any challenges or gaps in the VET tourism sector, such as mismatches between the skills taught and industry demands, accessibility issues, or barriers for learners and employers.**

A recent ETF study on skills mismatch measurement in the country (2019) and previous studies conducted in the country show a horizontal mismatch within a range of 30 to 45% and a vertical mismatch of between 27 and 53%. Data also shows labor shortages in fast-growing and export-oriented sectors in the economy. An ETF study confirms a number of trends: high and persistent mismatches; a relative deterioration in the position of tertiary-educated workers as a result of a large increase in the supply of such workers; an over-education phenomenon that is more prevalent than under-education; mismatches that are relatively small for workers aged between 20 and 24 and 25 and 29; the rewarding of higher education in the labour market as assessed by relative wages by education; and the incidence of mismatch variations by economic sectors. Overskilling, according to these calculations, is especially high for service and sales workers and skilled agricultural workers and to a lesser extent for craft workers and plant and machine operators. Undereducation, on the other hand, is highest among managers, and less so among technicians, associate professionals and clerical support workers (ETF, 2019b).

The initial VET system faces specific challenges in responding to labor market and learners` needs. These can be summarized as follows:

▪ insufficient correlation of VET profiles and programmes with local and regional labor market needs

▪ the lengthy process involved in updating qualifications standards and their reflection in the

education

5. Best Practices and Innovations

"Learn Smart, Work Skillfully" is a campaign implemented by the Ministry of Education and Science with the support of the Swiss Agency for Development and Cooperation, with the objective to promote and advance the secondary vocational education and training

The campaign is carried out through 1) Social dialogue or consultations with companies, chambers of commerce and local governments on the need to open new profiles/classes in secondary vocational schools across the country. The consultations are led by representatives of the Government, the Ministry of Education and Science, Mayors, companies and vocational schools, to discuss the needs of the real sector for opening dual classes in secondary vocational schools, new curricula and new enrollment policies in secondary vocational schools.

The social dialogue or consultations are carried out after conducting an analysis that defines a clear picture of the existing profiles offered by the schools, their compliance with the needs of the companies and the readiness for cooperation of the companies with the secondary vocational schools at local level. In 2021, 450 companies from all over the country participated in the analysis of the Ministry of Education and Science, of which 85% stated that they are ready to cooperate with secondary vocational schools and to accept students for practical training, in order to create professional and quality staff.

"Learn Smart, Work Skillfully" is also carried out through 2) Open days in secondary vocational schools, with the objective to raise public awareness about secondary vocational education and to emphasize the importance of vocational education for the national economy. Through the organization of open days in vocational schools in the municipalities, future high school students have the opportunity to get acquainted with large number of professions offered through vocational education, especially through dual education.

"Learn Smart, Work Skillfully" supports all stakeholders in the education system towards the advancement of the vocational education and training in a systematic way, in order for more young people to gain quality vocational education and training that contributes to better and decent employment.

The conference **Skills for Future Jobs** represents a platform for experts to engage in open dialogue and share good practices about how to connect skills with future jobs. Targeting high-level government representatives, policy makers, education sector representatives, private sector representatives, VET providers, youth organizations, and development cooperation specialists working in VET & youth employment, the conference is to extract opinions, considerations, and arguments of where the educational systems from the region should focus in the future. Future vocational skills, youth employment and entrepreneurship opportunities are the topics under which numerous local and international experts will provide input and will showcase future trends, all based on labor market needs and anticipations.

Speakers from governments, private sector, academia, and civil society from North Macedonia and the Western Balkans region as well as Switzerland and the EU, will present the latest research findings and share hands-on experiences.

The conference aims to set the base for a future platform on skills and employment and to foster exchange and cooperation at strategic and operational levels between relevant countries.

The Digital Fair for Secondary Vocational Education is an initiative implemented by the Ministry of Education and Science with the support of the Swiss Agency for Development and Cooperation, in order to promote and advance secondary vocational education and training. In order to inform the ninth graders and their parents about the opportunities offered by the secondary education for acquiring professional skills and gainful employment after graduation, the project Education for Employment in North Macedonia – E4E@мк and the Macedonian Civic Education Center have organized the digital fair for secondary vocational education. Faced with the COVID pandemic, a digital fair for secondary vocational education is for the time being the safest form of informing the ninth-graders across the country and their parents about the opportunities offered by the secondary vocational schools and the companies. In the future, a F2F fair for secondary vocational education will be organized, where companies and vocational schools will enable students to be part of a certain profession, through practical examples and realistic application of the profession.

Via illustrative examples out of a great number of occupations that are today extremely in demand in the labor market, the digital fair emphasizes the possibility of making a career choice through vocational education, through which the student gets the opportunity for practical training in a company and support from trained mentors. Through video sessions, the young people are acquainted with the educational programs of several secondary vocational schools, and have the opportunity to follow specific examples of successful high school students who by choosing secondary vocational education have become successful electrical and mechanical technicians, cooks, and mechatronics and transport technicians. The digital fair includes open discussions on topics related to future career choices, as well as presentations on education and training opportunities offered by companies that have dual classes in multiple secondary vocational schools. The entire program is designed in a fun, interesting and interactive way to bring secondary vocational education closer to young people that are to complete primary education.

The Digital Fair is a platform for introducing future high school students to the wide selection of professions offered by secondary vocational education and more importantly the offer of career opportunities. The Digital Fair together with the Social Dialogue and the Campaign "Learn smart, work skillfully" contribute to the objective of more young people gaining quality vocational education and training that leads to better and gainful employment.

The Digital Fair for Secondary Vocational Education is available at the following links:

Day One: https://www.youtube.com/watch?v=j6QX_j2ueX0

Day Two: https://www.youtube.com/watch?v=NIIgWWJWFHo

Very soon, the Digital Fair will be available in all languages of instruction in the Republic of North Macedonia.

6. **Visualization and Reporting: Presenting the findings through visualizations, such as charts, graphs, and maps. Create a comprehensive report that includes recommendations for enhancing the VET tourism system.**

Unemployment rate of young people
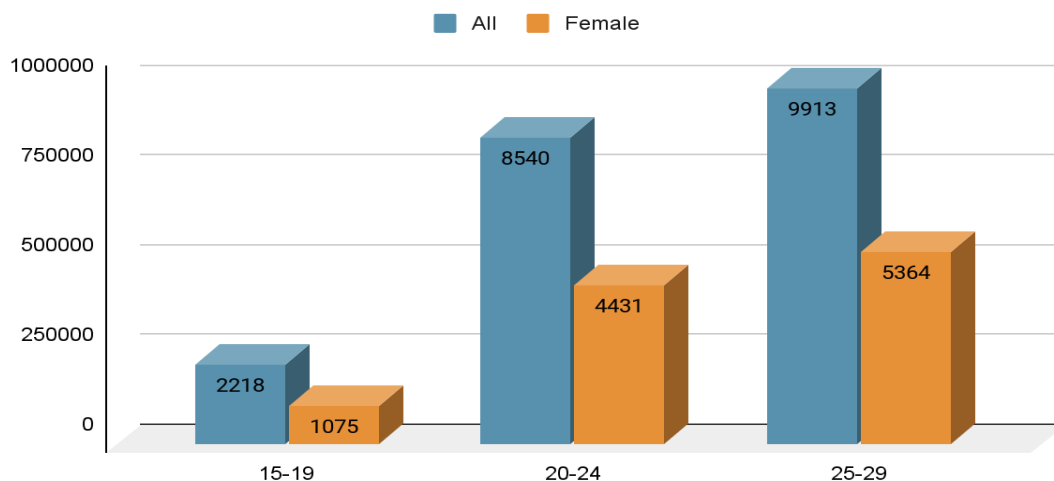
Graphics1. Unemployment rate of young people according to the National Baseline Report on Youth Unemployment in North Macedonia (http://civicamobilitas.mk/wp-content/uploads/2018/03/National-baseline-report-Macedonia-Youth-%20Unemployment.pdf%20/)

Supply and Demand of Workforce
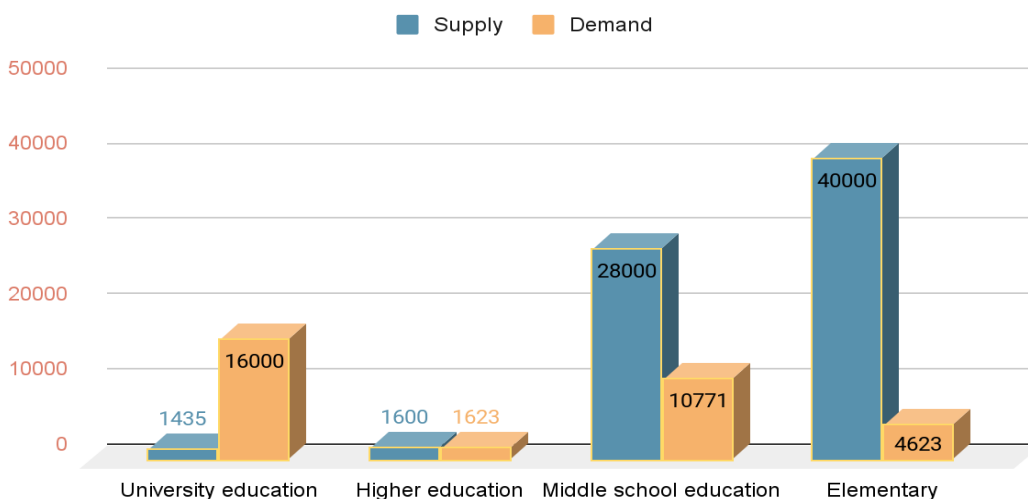
Graphics 2. Supply and Demand of workforce according to the level of education according to the Annual report of the Employment Agency of North Macedonia (https://av.gov.mk/content/Dokumenti/%D0%98%D0%B7%D0%B2%D0%B5%D1%88%D1%82%D0%B0%D1%98%20%D0%BD%D0%B0%20%D0%90%D0%92%D0%A0%D0%A1%D0%9C%202018.pdf/)

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Number of students enrolled in dual education
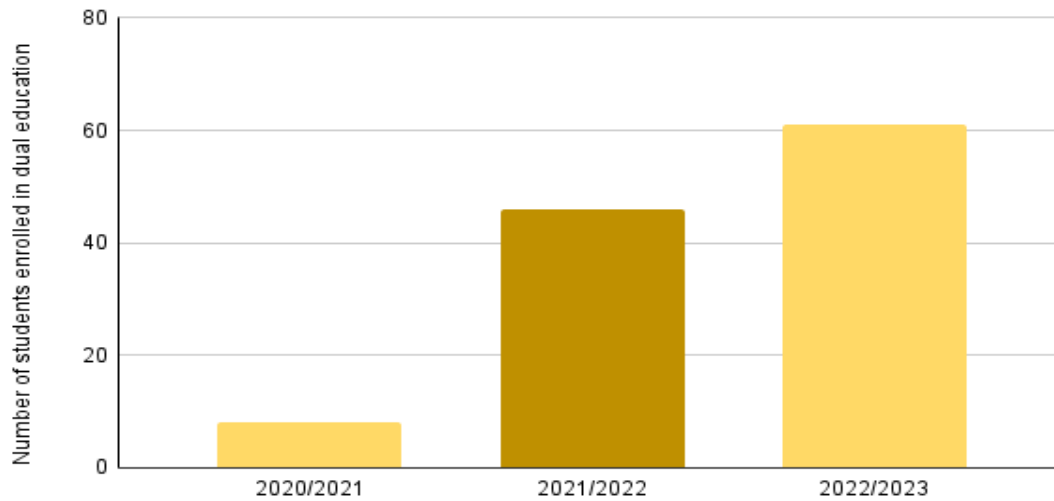
Graphics 3. Number of students in dual education on a state level

Number of school involved in Dual education on a state level
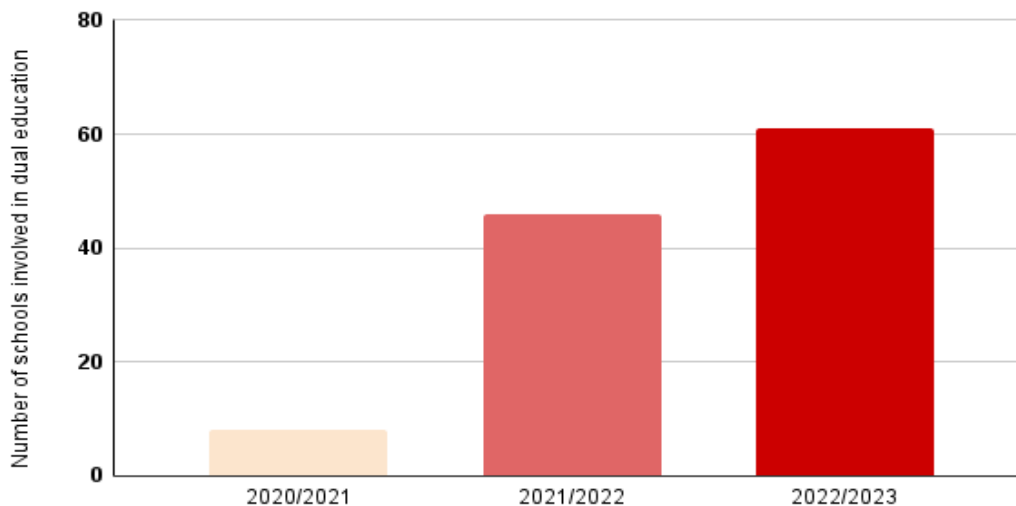
Graphics. 4. Number of Vocational High Schools involved in Dual education on a state level

Number of companies involved in Dual education
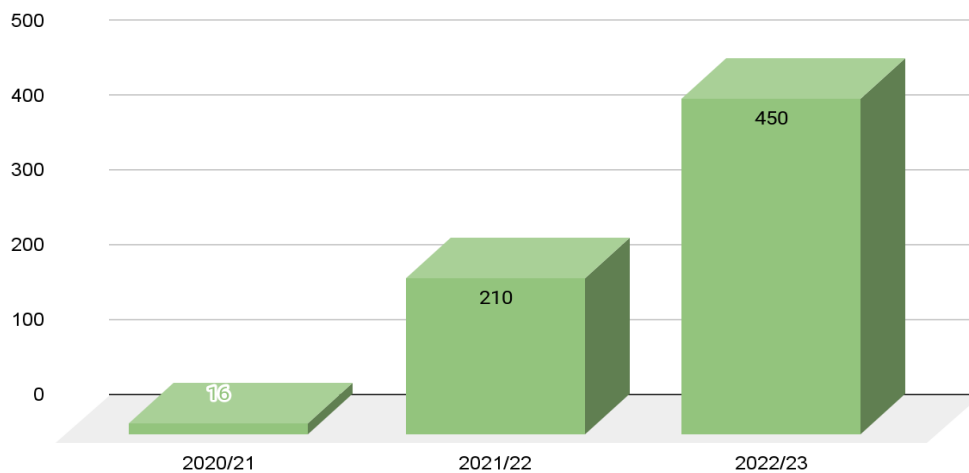
Graphics 5. Number of companies involved in Dual education

Using a mix of qualitative and quantitative data collection methods, such as interviews, surveys, and data analysis, will help to ensure a holistic understanding of the VET tourism landscape.

3.   Dual training paths mapped

Overall, the following has been identified: 20 courses in Albania, 24 courses in Kosovo, 21 courses in Macedonia.

The school program is the same, thus a unified one, for all the above-mentioned schools, based on the curricula frame for Hospitality Tourism program, as so approved from the national body in charge, namely AGJENCIA KOMBËTARE E ARSIMIT, FORMIMIT PROFESIONAL DHE KUALIFIKIMEVE (AKAFPK).

The **length** of the courses mapped ranges from a minimum of 7 hours (1 day) to a maximum of 384 hours.

The **contents/objects** of these courses are:

- *Marketing & Communication*: digital marketing, sales & distribution
- *Managerial and financial/economics aspects* (for Hospitality and Restaurant): management of reception activities (including use of information system and reservation), events management, accounting, financial elements, management of Food&Beverage, HRD management
- *Safety*: fire protection in Hotel & Restaurant
- *English language*
- *Cooking*: Basic Culinary Skills and Techniques
- *Territorial aspect*: cultural heritage management and marketing,
- *Tourism as a system*: tourism as a product, sustainable tourism, international tourism
- *Training courses for specific professional roles:* waiter, baker, etc.
- *Training courses that provide an overview of the entire hospitality sector*: Hospitality management, Hospitality business

Concerning **dual activities** the courses mapped are handled:

- in real working environments of hotels, restaurants or other environments where food and drinks are served, as well as in environments where receptions and banquets take place, but visits to businesses that offer this service are also recommended
- in classrooms as well as in the professional practice environments of the school, equipped with the appropriate tools.

4.   The survey aimed at the entrepreneurial system

4.1 Results of interviews

4.1.1.   Characteristics of the interviewed panel

The survey involved 20 organizations per partner country for a total of 60 interviews carried out on field with the support of a questionnaire structured into ten open-ended questions. The organizations that were contacted and interviewed operate in various capacities in tourism; in detail, the panel was made up of 20 hotels, 19 restaurants, 10 tourism intermediation and production companies (AdV and TO) and 11 organisations, not directly part of the tourism sector but which carry out transversal or support activities for operators in the sector in such a way as to still have a privileged, albeit direct, vision of the dynamics and critical issues affecting the different sectors of tourism. These are Chambers of Commerce, training agencies.

4.1.2.   The scenario: the drivers of change

In the three partner countries, the tourism sector has experienced significant growth in recent years in terms of arrivals and presences, attracting both domestic tourism and an increasing number of foreign visitors. This boom has been facilitated by several factors, including, for points:

- **Air traffic liberalisation:** The low cost and general increase in direct flights from several European cities to Macedonian, Kosovan and especially Albanian destinations has made the three Balkan countries more accessible to tourists.
- **Improvement of road and internal connection infrastructure:** Especially after the end of the political and social tensions in some countries, programmes for the improvement and construction of new roads, bridges and airports were initiated, which improved mobility within the individual countries.
- **Tourism promotion:** In all the areas concerned, promotional campaigns were launched to make the beauty and attractions known to an increasingly broad and interested public.
- **Competitive costs:** With due differences between country and country in general, hospitality and catering services are offered at a good value for money compared to other Mediterranean countries. The differences are appreciable. By way of example and comparison, the following tables show that within the Balkan countries there is a certain uniformity of the average cost of commercial catering with Albania having slightly higher values but in any case, with a marked difference compared to Italy, the project's westernmost partner.[17]

ALBANIA Restaurants			Interval
Meal, Cheap Restaurant	7,72 €	4,34	14,47
Meal for 2 Persons, Medium Restaurant, Three-course meal	33,76 €	24,11	62,70

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[17] https://it.numbeo.com/costo-della-vita/pagina-iniziale

McDonalds menu (or equivalent menu)	6,75 €	5,79 7,72
Domestic beer (0.5L on tap)	2,22 €	1,16 3,86
Import beer (0.33L bottle)	2,89 €	1,93 ,82
Cappuccino (normal)	1,53 €	0,77 -2,41
Coke/Pepsi (0.33L bottle)	1,42 €	0,96 -1,93

KOSOVO Restaurants		Interval
Meal, Cheap Restaurant	4,50 €	3,00 ,00
Meal for 2 Persons, Medium Restaurant, Three-course meal	20,00 €	15,00 ,00
McDonalds menu (or equivalent menu)	5,80 €	5,00 ,00
Domestic beer (0.5L on tap)	2,00 €	0,90 -3,00
Import beer (0.33L bottle)	2,00 €	1,50 -3,00
Cappuccino (normal)	1,21 €	1,00 -1,50
Coke/Pepsi (0.33L bottle)	1,16 €	1,00 -1,50
Water (0.33L bottle)	0,99 €	1,00 -1,00

MACEDONIA restaurants		Interval
Meal, Cheap Restaurant	4,50 €	3,00 ,00
Meal for 2 Persons, Medium Restaurant, Three-course meal	20,00 €	15,00 ,00
McDonalds menu (or equivalent menu)	5,80 €	5,00 ,00
Domestic beer (0.5L on tap)	2,00 €	0,90 -3,00
Import beer (0.33L bottle)	2,00 €	1,50 -3,00
Cappuccino (normal)	1,21 €	1,00 -1,50
Coke/Pepsi (0.33L bottle)	1,16 €	1,00 -1,50

Restaurants ITALY		Interval
Meal, Cheap Restaurant	15,00 €	10,00 ,00
Meal for 2 Persons, Medium Restaurant, Three-course meal	60,00 €	45,00 ,00
McDonalds menu (or equivalent menu)	10,00 €	8,50 ,00
Domestic beer (0.5L on tap)	5,00 €	3,00 ,00
Import beer (0.33L bottle)	5,00 €	3,00 ,35
Cappuccino (normal)	1,58 €	1,00 -2,50

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Coke/Pepsi (0.33L bottle)	2,41 €	1,50 -3,50
Water (0.33L bottle)	1,12 €	1,00 -2,00

- **Information and communication technologies.** In all the countries of the WB partnership, tourism appears to be constantly evolving and innovating. The changes are brought about by the action of numerous factors among which the main one, and the one most frequently mentioned in the interviews conducted with representatives of the production systems, is certainly the evolution of technology and the way information is processed. The adoption of digital technologies has revolutionised the way in which tourists book trips, interact with companies and find out about destinations. The development of online platforms and social media has made it easier to search for and book trips and encouraged more spontaneous and flexible tourism. In addition, the adoption of technological systems that enable companies to communicate directly with the end consumer also provides the opportunity for better knowledge of their customers and thus personalise offers, provide targeted advice and improve the guest experience. Thanks to communication technologies, manufacturers are getting closer to customers via smartphones and mobile apps that are essential tools for tourists, facilitating navigation, communication and access to information in real time. But IT also contributes to revolutionising production and distribution models: platforms such as Airbnb and Uber have transformed traditional models, offering alternative accommodation and experiences.

  The latest frontier in the evolution of technology, which has not yet unfolded all its possible effects, is artificial intelligence and the consequent possible automation of processes and activities that can thus be made flexible even if not implemented by human resources.

- **Globalisation**: Increased global competition has pushed tourism companies to improve the quality of their services and to diversify their offerings, seeking above all personalisation and proximity to the customer also by using communication technologies and AI.
- **Changes in consumer preferences** ('experiential' tourism): today's tourists are more demanding and seek personalised and authentic experiences. Modern tourists have all acquired a remarkable ability to assess the quality levels of total performance. The individual suppliers, hotels restaurants, adv etc. are all on the same level and their activity is seen and evaluated as an element of an overall process that concerns the entire time a customer spends in a location. It is therefore the territory with its particularities and culture that represents the product sought and consumed.
- **Regulatory factors:** In all countries of the partnership there is a progressive introduction of protective regulations. At the moment, there is not full uniformity, but the progressive action of the EU in this regard is also pushing the neighbouring countries, and thus having close relations with the EU, towards greater attention to environmental sustainability issues and the adoption of new standards towards environmental protection by tourism businesses.

In conclusion, the tourism systems of the three Balkan countries are evolving and have **great potential for the future**. By meeting the challenges and seizing the opportunities, they can establish themselves as tourist destinations of excellence in the Mediterranean panorama thanks to the good quality of the accommodation/restaurant facilities, the richness of the natural and landscape offerings, and the multiculturalism that characterizes the coexistence of different population groups and also influences the structures and architecture, creating a great variety of possibilities for entertainment. In the following boxes, the special features of the individual countries are briefly illustrated.

ALBANIA

Lack of skilled labour: The Albanian tourism sector needs qualified personnel who can speak foreign languages and provide a high-quality service.

Seasonality: Tourism in Albania is still concentrated in the summer months, with a significant decline during the rest of the year.

Sustainable development: A commitment to environmental and social sustainability is necessary to ensure the protection of the land and local communities.

KOSOVO

Political stability: Political stability and changes in the various regions influence travel trends and perceptions of security.

Single travellers: The growing trend towards solo travel has led to tailor-made packages for single travellers, providing security and social opportunities.

Sports tourism: Interest in sports experiences is increasing and consequently the offer for sports-oriented tourism experiences is growing.

MACEDONIA

Rising costs: Rising expenses for electricity, food, employee wages and other cost items create financial pressure on companies.

Skilled labour shortage: It is difficult to find and retain qualified personnel due to various factors such as migration, competition or unattractive working conditions.

Changing market: New sales methods, changing tourist demands, global trends and cost increases require adaptability.

Difficulties in digitisation: infrastructure networks are not yet at the level needed to guarantee coverage throughout the territory and data security

Seasonality: concentration of presences in the summer months with sharp drops in the marginal seasons

4.1.3. Impact of change factors in tourism

In general, the exponential growth of tourism in the three Balkan countries is relatively recent. In Albania, development has affected both mountainous and coastal areas, which are often considered the main tourist attractions by foreigners visiting the country. Tourist accommodation, traditionally identified in hotels, has evolved into multi-activity complexes and resorts, where traditional hospitality is combined with a wide range of sports and recreational activities, and at the same time the MICE sector has developed.

In all countries, however, within a broader definition of the tourism system that encompasses more than just accommodation, some sectors have been more markedly affected by the changes and trends mentioned in the previous paragraph. The impact varies depending on factors such as technological advances, greater variability in consumer preferences and external events, and all tourism sectors have been affected. In summary:

Hotel sector: It has undergone significant changes, with the advent of online booking platforms and the sharing economy (widespread use of social networks to choose destinations) which have changed the way travellers search for and choose accommodation, influencing the way hotels operate and market their services. ITCs have enabled a strong increase in online bookings, overtaking the traditional system of tourism distribution and, consequently, also changing the way intermediaries (ADV and T.O.) are on the market. With regard to more traditional technologies, in hotels, there has been an increase in the use of intelligent technologies such as automated check-ins and virtual concierges, and also the adoption of chatbots and artificial intelligence systems for customer service. These tools have also changed the way human resources work, who now have more time and tools to follow the customer journey. The scenario analysis also highlights (especially in Albania and Macedonia) how both small and large facilities are finding it difficult to find new employees due to a variety of factors such as inadequate curricula, lack of attractiveness of employment in the sector and, in Macedonia, also due to labour costs.

Across the board, all three Balkan countries complain of a strong seasonality of tourist flows with a high concentration in the summer season and towards seaside resorts. This entails the impossibility of being able to distribute fixed costs over a longer period of time and transfer to the only important season in terms of the number of arrivals and presences, the possibility of achieving economic results to ensure the survival of the companies with the related difficulties of being able to adopt adequate competitive manoeuvres by applying revenue management techniques.

Travel agencies: Traditional travel agencies have had to face the challenges posed by the spread of online booking platforms. Many travellers today prefer to plan and book their trips independently by relying on and using the resources of the web. However, travel agencies have retained an important share of traditional customers who prefer to talk to a physical manager and, even in the case of OTAs, have adapted to the new situation by offering specialised services, customised itineraries or niche travel experiences. There is a growing interest in unique and immersive experiences and organisations offering these types of services have seen demand increase.

Catering and food production: This sector has seen the evolution of consumer preferences. There is an increased focus on local and authentic culinary experiences which has resulted in the search for traditional, low environmental impact, sustainable and zero km raw materials. Technology has also played an important role in processing and cooking techniques, providing the opportunity to innovate even traditional recipes that might be out of step with the tastes of international tourists, especially Italians. The catering industry is also interested in the changes brought about by ITC for the dissemination and advertising of offers and to offer greater ease of booking and illustration, also in foreign languages, of the specialities made available to customers.

In general, in all the elements that make up territorial tourism offers, including parks, museums, entertainment venues, etc., there is a need to adapt to the evolution of tourism demand, both domestic and foreign, which demands interactive experiences also supported by technology.

4.1.4. Impacts of digital transformation on work processes in tourism

Tourism, in recent years, has undergone a significant transformation by increasingly embracing digital technologies to improve the customer experience and optimise internal production operations and control cost and revenue streams. One of the most noticeable changes is the shift from manual bookings to online platforms. This not only facilitates the process for customers, but also accelerates the flow of bookings, improving the overall efficiency of the service.

In parallel, traditional marketing has been redefined by the widespread use of social media, search engine optimisation (SEO) and online advertising. These strategies allow companies to reach a larger and more targeted audience, amplifying their online presence and increasing opportunities for interaction with potential customers. The use of chatbots and artificial intelligence has also made responses and assistance more efficient and automated, improving the overall customer experience.

To further improve customer relationships, more and more companies are adopting digital Customer Relationship Management (CRM) systems. These tools allow customer interactions to be tracked and personalised, offering a more tailored service and better management of business relationships.

In order to engage customers more effectively, many companies are investing in virtual reality by creating digital tours. These immersive experiences are used for promotional and advertising purposes because they increase customers' interest and engagement by giving them a taste of the product or service before they even make a booking.

In the payments industry, the widespread adoption of digital and contactless solutions has revolutionised financial transactions. Integrated into online platforms and apps, these systems make transactions faster, safer and more convenient, eliminating the need for cash and manual processes.

ICT are also used to improve business organisation with applications that simplify personnel management and facilitate remote working, improve communication and collaboration, and improve coordination between employees spread across different locations. In particular in the hospitality sector (AL and KO), ICT are also deployed for staff training using digital platforms, for supply chain management and also used for direct customer services such as concierge services with artificial intelligence, digital loyalty programmes and more.

Looking to the future, those interviewed emphasised the foreseeable introduction of even more innovative technologies that will continue to change the relationship with tourists such as facial recognition to make check-in processes faster and safer.

These are the common elements but with different levels of implementation in the three countries. In particular, while the infrastructures in Albania and Kosovo are at a good level of coverage and power, in Macedonia, on the other hand, it is lamented that the digitisation of tourism is still in its infancy, with the exception of online booking systems such as Airbnb in metropolitan areas. Stable conditions for a broader digitisation of the sector are lacking, hampered by inadequate digital infrastructure, skills shortages and resistance to change.

The tourism scenario in the three countries is constantly evolving. The changes in consumption patterns and the consequent modifications and innovations introduced in tourism offers to keep up with the markets highlight how there is also a need to introduce new professional profiles. Among the various drivers of

change analysed, the two that appear to have the greatest impact in the three countries are digitalisation and the 'green transition'.

Emerging profiles and skills in the context of digital and green transitions highlight the growing demand for experts in data analytics, cybersecurity, artificial intelligence, sustainability and digital marketing. All three reports emphasise the importance of these skills for individuals and organisations that want to remain competitive and contribute to sustainable solutions.

Sustainability and digitisation are key factors that go hand in hand with the evolution of social media and peer-to-peer contacts between tourists, so all reports mention social media managers/operators with the necessary skills for social media management and e-commerce among the new roles required

In general, the reports provide a comprehensive overview of emerging trends in the sustainability and digital sectors, highlighting the importance of adapting to these changes and acquiring the necessary skills to succeed in an ever-changing market where sustainability specialists, data analysts, online community managers, digital content creators, etc. reflect the growing need for specialised skills.

The territorial surveys show that in tourism there is also a significant shift in the search for skills capable of supporting cognitive activities, i.e. all those abilities, from the simplest to the most complex, that enable us to perceive the world around us and to foster relationships with others.

4.1.5. Impact on professional roles and competencies

From the analysis of the interviews, it emerges that the evolution of the sector requires strong action to update and retrain the human resources working in the companies. This need is also expressed directly by the employees who express a demand for training especially to improve their communication skills and the use of digital tools. At the same time, companies are placing greater emphasis on the possession of soft skills such as empathy, and the ability to adapt to different situations and problem solving, which become crucial for a customised service and for managing guests from different backgrounds and with very high expectations.

The comparison of the results also shows, in a clear and detailed manner, how many of the new development opportunities can be derived from the increasingly widespread use of data and digital technologies. The personalisation of experiences, sustainability and collaboration are central themes that require attention and action on the part of industry players, but above all require careful analysis of the information already held by companies. The study of internal data regarding customer preferences is already valuable capital for companies, but to this must be added what can be extracted from the observation of what appears on the web and social media

For this, however, it is necessary to bridge the digital divide. First of all, ensuring effective and equal access to the web in terms of bandwidth (MK) but also in terms of specific skills (MK-KO-AL) for the collection, classification and interpretation of data

4.1.6. The dual training approach

The approach to dual training (school-to-work) for new employees, and to *continuing training* for those already working, is different in the three partnership countries. While dual training is practised in Kosovo and Albania, in Macedonia there are no takers in this regard. The indications obtained emphasise the fact that in Macedonia there is no interest on the part of companies in participating in this type of programme, but it is also emphasised that this is also due to the fact that there is currently no clear possibility of activating this type of pathway, to which is also added the concern that once trained, the young people will leave the company to seek other employment situations outside of Macedonia.

For the other two countries, however, the situation is very different.

In Albania and Kosovo, on the other hand, the topic of dual training is very topical. To a greater extent it is practised in Albania, *(the main advantage of this method is the direct contribution that companies can make to the quality of theoretical knowledge)* which thus stands as a country where experimentation is much more advanced, even if, of course, even here there are critical points that are partly shared with Kosovo.

First of all, it is emphasised that it is important to find the right balance between theoretical and practical activities to be included in the educational programme. The content of the training should provide uniform and defined standards so that the courses taken and the possibility of certifying skills are recognisable. *(Challenges may include balancing theoretical instruction with practical experience, securing resources for practical training and ensuring the relevance of the curriculum. AL); (Ensure that the practical training offered by companies is first-rate and closely related to the theoretical parts of the programme; Ensure uniformity of training standards and expectations between the educational institution and the world of work.; The main challenges are the difficulty in aligning school curricula with the real needs and practices of the sector. KO).*

The greatest concern that can be seen in the analysis of the territorial surveys is on the need to keep curricula up-to-date and up-to-date in a coordinated manner between companies and schools. In this sense, the quality and presence of tutoring in companies also plays an important role, not least for reasons of student safety. *(One of the main critical issues associated with these programmes is ensuring the safety of students in the workplace, especially in the most dangerous working environments. When you have students working for you, you need a mentor for them, especially in the beginning, and you need to be in contact with the school. that teachers and trainers have current and relevant knowledge of the industry. AL and KO) (Aligning theoretical education with the practical requirements of the industry, ensuring mentors for students and adapting quickly to technological changes pose the main challenges in dual training programmes. critical issues. AL)*

(One of the main critical issues associated with these programmes is the challenge of keeping them up-to-date with the rapid changes in technologies and industry practices. Industries, particularly those affected by digital and green transitions, are evolving at a rapid pace, requiring constant updates to the curriculum and practical training components to ensure that students are equipped with the latest skills and knowledge. KO)

In conclusion, with respect to what was highlighted in the interviews, dual training therefore sees criticalities with respect to:

- **Coordination between Schools/Vet providers and Companies.** A critical issue is to ensure effective coordination and communication between schools and companies. Both entities must work collaboratively to align the theoretical and practical components of the training programme. Moreover, the success of dual training programmes depends above all on the quality of the practical training provided by companies, where the role of the tutor and mentor, who are in charge of following and supervising the students' learning pathway, is relevant and strategic. It is crucial to ensure that students gain practical experience in line with industry standards and future job requirements. There is also an underlying problem in the choice of companies because some may be more involved in the training process, particularly those where company managers have participated in similar programmes and have seen the value of it, while others may find it difficult to provide a meaningful learning experience. *(Yes, I participated and learnt a lot. The training was mainly carried out in practice. Challenges include allocating resources for practical training and ensuring the relevance of the curriculum to industry needs. AL)*
- **Maintaining student involvement and motivation** throughout the course can be a challenge. It is essential to design programmes in a way that keeps students interested in both the theoretical and practical aspects of their training. (*A significant challenge is to ensure that students adapt effectively to the corporate culture and work environment. Integrating theoretical learning at school with practical training in a real business context can be a complex process and it is crucial to ensure a smooth transition for students. KO)*

  (Helping students manage their time effectively between school and work responsibilities KO. Offer appropriate career guidance to help students integrate their learning with their career goals. KO Challenges could include aligning training programmes with industry needs, providing students with practical experience and ensuring continued relevance amidst rapidly changing technologies.AL During school time, it is difficult to involve students because school time overlaps with work. But we try to make use of their internship hours where we take students on internships for several weeks in a row, or perhaps in the afternoon or during the summer. AL)

Training is an investment of time, especially for those starting their learning journey, and an economic investment for the schools and companies that participate in the programs. Involving students and other actors in paths that are not completed or whose skills, after their conclusion, are not used, or used outside the sector in which the projects were carried out, is a critical issue on which, directly or indirectly, emphasis was placed by the operators interviewed. It is therefore probable, but this is a subsequent evaluation that should be further explored, that the phenomenon of young people leaving the sector who have followed specific learning paths is also relevant.

4.1.7. Required figures and skills in the labour market

The demand for professional figures for the three main sectors of tourism accommodation, intermediation and catering presents a very varied situation in the three partner countries. The basic fact in common with all sectors is that there are considerable difficulties in the search for professional profiles for both higher levels and more operational figures.

With regard to accommodation businesses, companies often find it difficult to find employees capable of working with digital technologies. This situation is particularly evident in Albania and Kosovo.

In all three countries, however, even the most operational figures appear to be difficult to find. *(Companies often have difficulty finding professionals skilled in digital technologies, sustainability practices and with a mix of technical and transversal skills. AL - We need skilled workers of all levels, waiters, cooks, hygienists, etc.) MK - Sommelier KO).*

A peculiarity, which is explicitly highlighted in some countries (AL and KO), is that companies in the tourism sector often find it difficult to find professionals with experience in sustainable tourism practices. (*This role requires people with a deep understanding of sustainable tourism principles and the ability to implement eco-friendly practices AL).*

In restaurants, on the other hand, there is a widespread shortage of skilled workers at all levels: cooks, waiters, pastry chefs but also cleaners. In addition to these, there are difficulties in finding more specialised and highly trained figures, e.g. culinary anthropologists, ecological architects and digital experience curators as well as cultural gastronomy experts, blockchain integration specialists and ecotourism (AL) guides. Niche roles in demand but difficult to fill due to the lack of specialised educational programmes. Companies often struggle to find candidates with soft skills such as adaptability, emotional intelligence and cultural competence. Important evidence comes from the survey in Albania, which also emphasises the need to improve the quality of the training corps.

Lastly, but only in Kosovo, the issue of intermediation companies, both tour operators and traditional retail agencies and OTAs, which face difficulties in finding professionals with experience in the management and promotion of cultural and historical tourist sites and further obstacles in finding professionals with experience in sustainable tourism practices.

The difficulty in finding new employees is particularly critical in Albania where tourism is facing a labour shortage crisis and the problem is likely to persist in the coming years, given current demographic and emigration trends. The sustainability of the sector depends on capacity building to address this problem, and it is crucial that the tourism business acts to make the sector more attractive to workers as well, by involving local communities, undertaking initiatives to improve and retrain the workforce, and promoting training and apprenticeship programmes. There is also a call for public intervention in working with the sector to address structural issues and support them through financial incentives and other forms (wage subsidies, etc.), infrastructure, digitisation of public transport, etc., and there is a need to define the completion of the tourism training chain by addressing the lack of vocational schools or training centres.

In Albania, first and foremost, there is therefore a complaint about the lack of specialised training, which should be addressed by updating the curricula of vocational schools, also through collaboration between the tourism industry and educational institutions to bridge the gap by designing curricula in line with the needs of the sector.

In the hospitality sector, the difficulty in finding specific professionals also stems from skills disparities, educational gaps, negative perceptions, rivalry with other sectors, perceived stagnation and external influences such as global events or economic downturns. New employees, with the required combination of technical and transversal skills, are often difficult to find due to the changing and dynamic nature of the sector, which requires a combination of technical skills and transversal skills (communication, problem solving, adaptability) that needs to be acted upon and which is not followed by training (AL and KO).

The access of new entrants to courses to acquire the necessary skills is then hampered by misconceptions about the industry's working environment, long hours and limited career growth. These factors may deter potential candidates from pursuing a career in the hospitality industry. (AL - KO - MK).

Finding professional profiles is a challenge on the labour market in all project partner countries today. The departure of young people and the lack of interest in professions have led to difficulties in the labour market. Country reports show that tackling this problem requires a multifaceted approach involving cooperation between companies, educational institutions and other stakeholders. Many strategies appear possible; as also highlighted above, updating curricula, communication aimed at improving the image of work in tourism and counteracting prejudices, also improving wages, which do not appear particularly attractive in motivating people to enter tourism as a job, and others. However, there is one aspect that is highlighted more than others, namely the need to extend periods of practical experience also with apprenticeship and traineeship programmes. This could be a channel, in combination with orientation activities, also developed using more modern technologies and languages, to improve recruitment and motivation to choose tourism as a career area. This could also be further supported by **a better use of distance learning technologies or to simulate work environments using virtual reality. In this way, in complete safety, students could learn at least the first steps of the individual work activities and enter the subsequent company experiences already with a minimum of knowledge that would allow them to be immediately operational**.

In conclusion, it seems necessary to take action to improve national training systems with a greater focus on the needs of the sector and the development of skills in line with the demands of changing labour markets. In summary, it would be good and useful to intervene with:

- Partnership with employers: promote strong partnerships with industry leaders to ensure that training programmes are aligned with current and future workforce needs. Set up advisory committees with industry professionals to provide insights into skills requirements.
- Flexible and agile curricula: develop flexible and agile curricula that can adapt quickly to technological advances and industry trends. Incorporate case studies and real-world projects to provide practical experience.
- Practical learning opportunities: integrating practical experience, internships and cooperative education programmes into academic programmes. This enables students to apply theoretical knowledge in real-world contexts.
- Integration of technology: integrate technology into educational practices, including **e-learning platforms, virtual labs and simulations**. Familiarise students with the tools and technologies used in their respective fields.
- Soft skills development: Emphasise **the development of soft skills, such as communication, critical thinking, problem solving and teamwork**. These skills are essential for success in different professional environments.
- Interdisciplinary approaches: offer interdisciplinary programmes that encourage collaboration in different fields. This reflects the reality of many modern workplaces where employees need diverse skills.
- Lifelong learning opportunities: promote a culture of lifelong learning by offering opportunities for continuing education and skills enhancement. Offer short courses, workshops and online resources for professionals at different career stages.

- Guidance: enhance career counselling services to guide students in making informed decisions about their educational paths and potential career trajectories. This includes providing information on emerging industries and in-demand skills.
- Inclusive educational practices: Implement inclusive educational practices that address diverse student populations. Ensure that teaching materials and methods take into account the needs of students from diverse backgrounds.
- Internationalisation of education: promote global perspectives by encouraging international exchanges, collaborative research projects and exposure to different cultures. This prepares students for a globalised labour market.
- Entrepreneurial skills development: incorporate entrepreneurship education to cultivate a culture of innovation and creativity. **Provide students with the skills and mindset necessary to start their own ventures**.
- Continuous feedback loops: establish mechanisms for continuous feedback from employers, alumni and industry partners. Use this feedback to refine and update training programmes to meet current industry needs.
- Emphasis on digital literacy: integrate digital literacy skills into the curriculum, ensuring that students are proficient in the use of digital tools, information management and online collaboration.
- Sustainability Curriculum: include training in environmental sustainability, preparing students for careers that address climate change and sustainable practices in various sectors.

4.2 Results of questionnaires

4.2.1. Characteristics of the interviewed panel

Respondents to the questionnaire were a total of 154, with 53% from the "Hospitality" sector and the remaining from the "Catering" sector, in line with the project VIRTuAL targets.

Type of respondent

Co-funded by the European Union
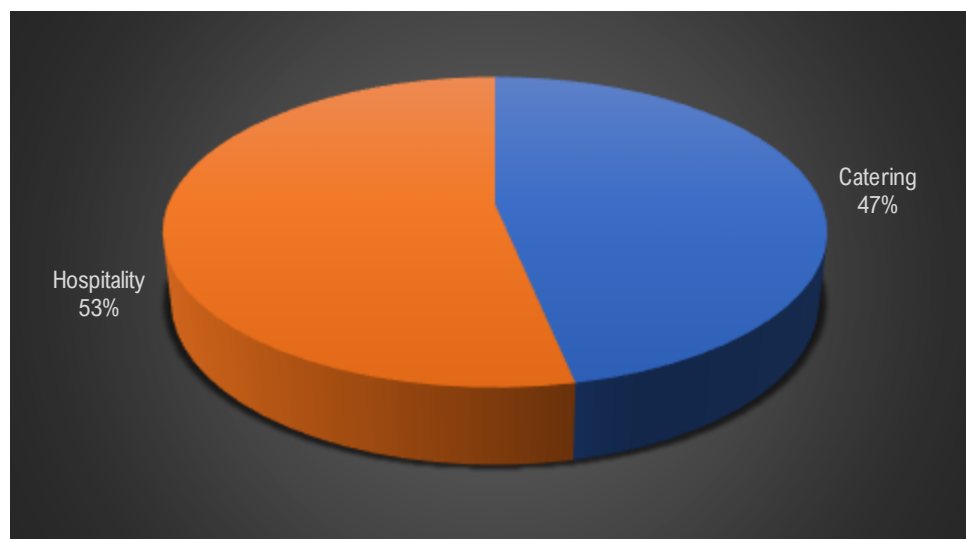
The interviewed companies come equally from the 3 partner countries of the project.

Geographical origin of the respondents
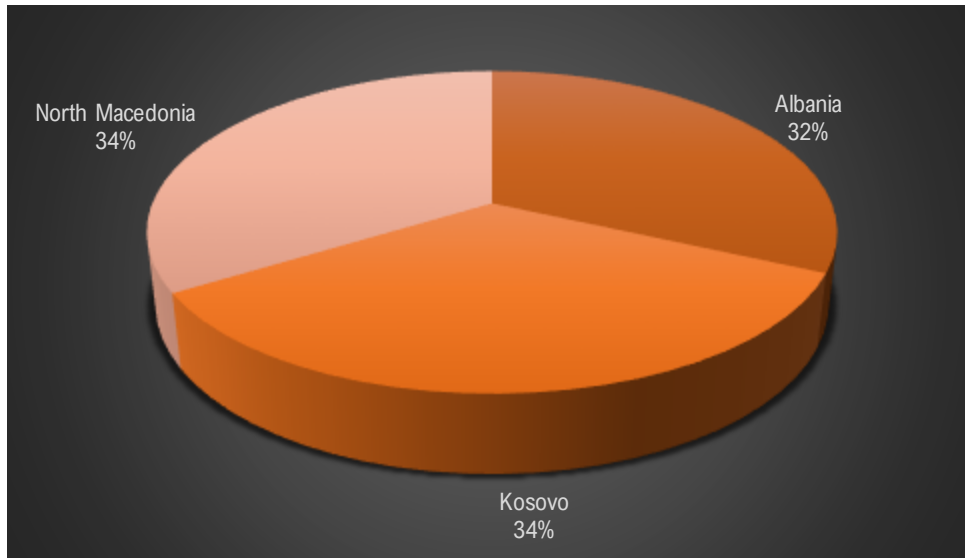
Catering companies primarily come from Kosovo (61%).

Geographical origin of the respondents (Catering)
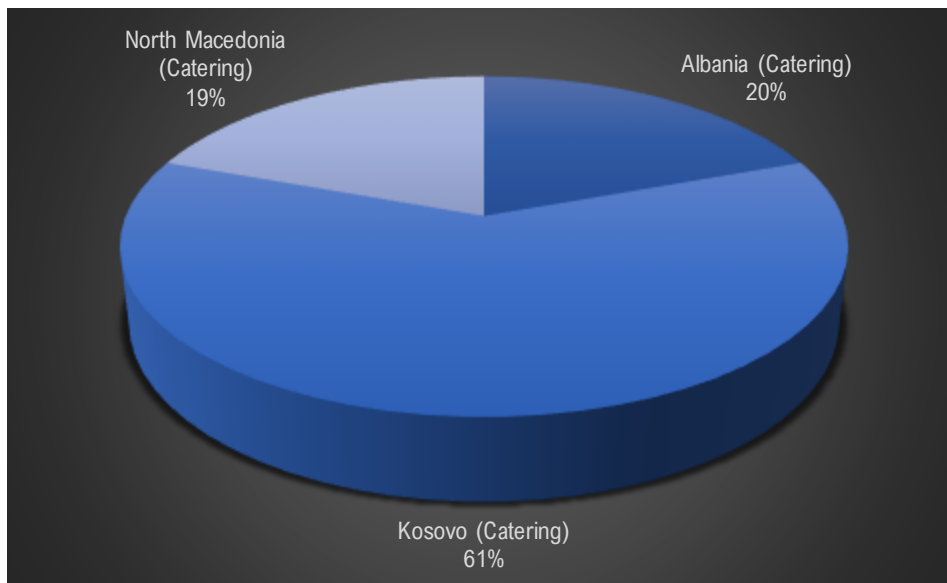
Hospitality companies primarily come from North Macedonia (46%).

Geographical origin of the respondents (Hospitality)
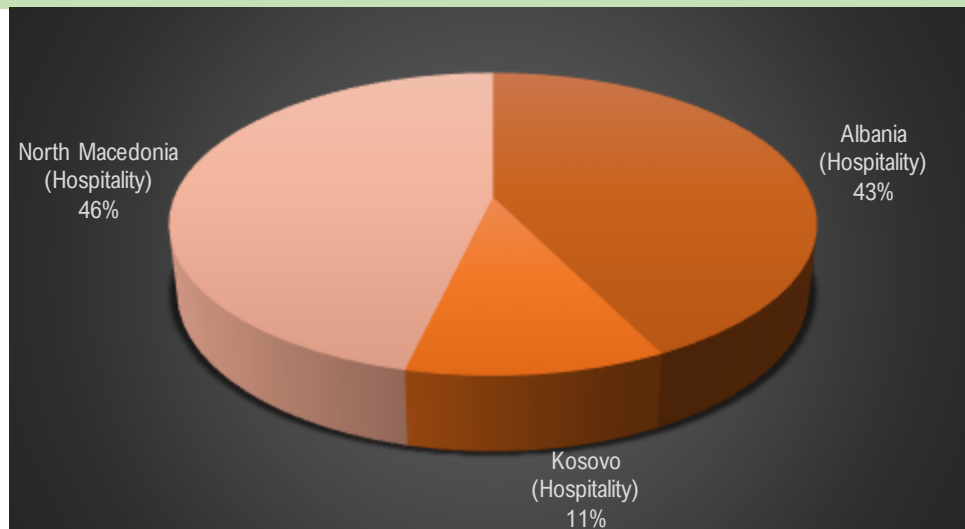
The interviewed companies, when considering specific types of affiliation, are mainly restaurants, followed by high-category hotels. It is interesting to note the presence, within the sample, of groups that represent multiple types simultaneously, providing a broader view of the sector, following a supply chain logic.

The average number of employees in the interviewed companies is 23.

Average number of employees per type of respondents
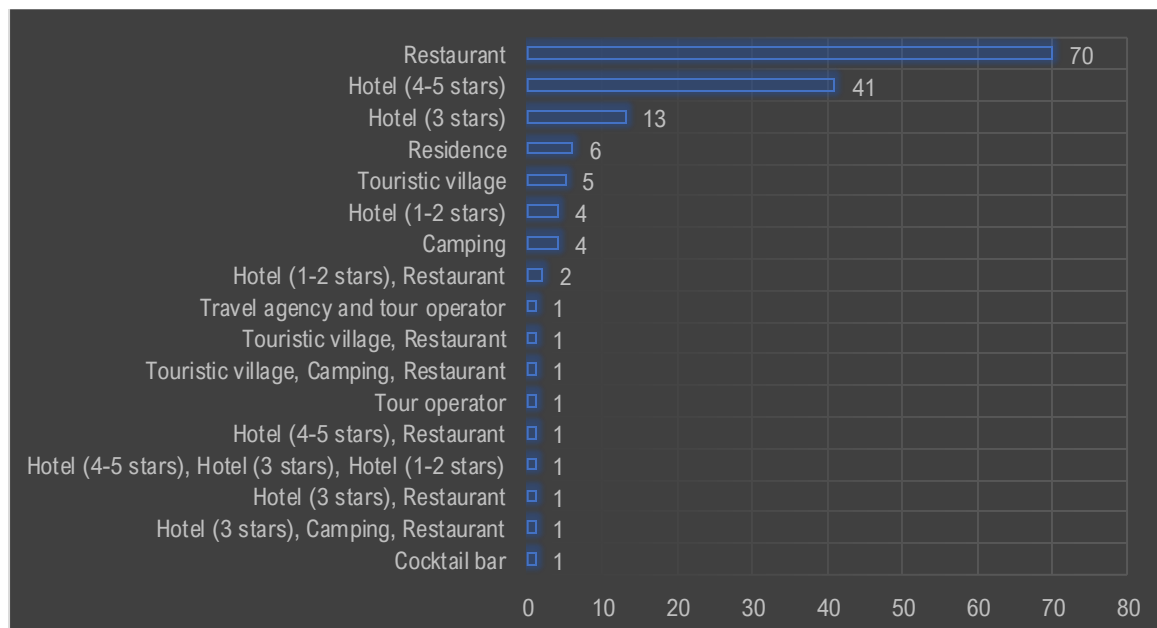
The sample/panel is mainly composed of companies that operate year-round. Only 11% manage their business with seasonal openings. These are also recently established companies, considering that the average startup year is 2011.

Opening periods

Seasonal (opening period) 11%

Annual (opening period) 89%
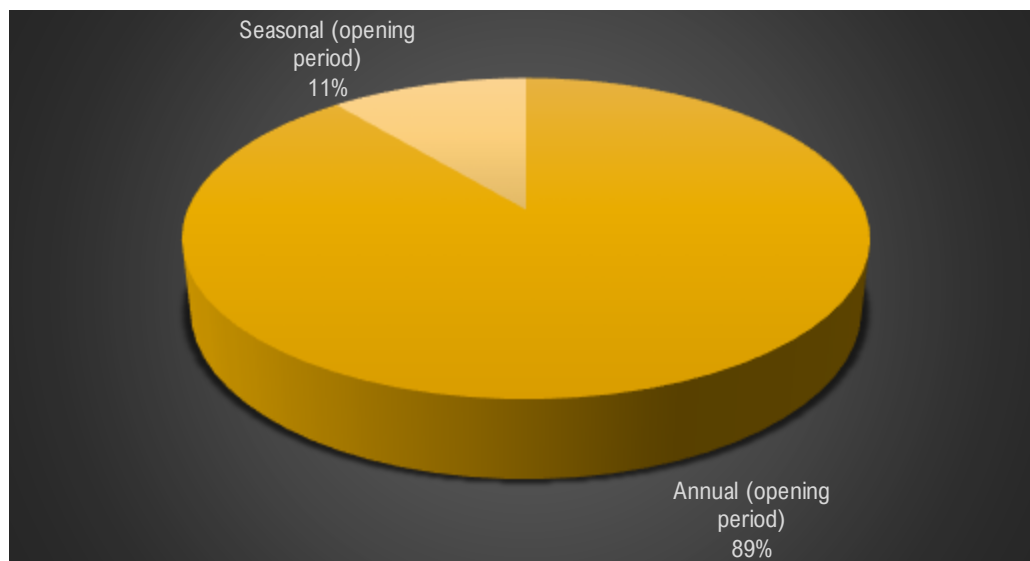
4.2.2. Staff recruitment

The channels primarily used for staff recruitment18 are "applications received directly by the company or presentations received of the workers" (more than 40% of the sample); immediately following are "networks of personal acquaintances (friends, relatives, …)" who support the selection process with applications, referrals, etc. (39.6%). According to the sample, an important role is played by "Public employment services" (37%), which outperform private ones ("Private employment agencies") in the demand and supply matching process (22.7%). "Vocational training institutions" play a marginal role, although they are still present in the matching system (9.7%).

Recruitment channels

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[18] The question allowed for the possibility of indicating multiple response options.

Co-funded by the European Union

Source	Percentage
The applications received by the company or the personal presentation of the workers	42,2%
The network of personal acquaintances (friends, relatives, other entrepreneurs, etc.)	39,6%
Public employment services	37,0%
Private employment agencies	22,7%
Recruitment agencies	18,8%
Schools	16,9%
Newspaper advertisements	13,6%
Professional firms (lawyers, accountants, labor consultants, etc.)	11,7%
Vocational training institutions	9,7%
Databases	7,8%
Trade associations	7,8%

4.2.3. Drivers of Change and Strategies

The companies in the sample/panel have identified, in perspective, the key drivers of change that could impact the company and its organization more than others. In addition to economic stagnation, which is mentioned in almost half of the responses, there are significant concerns related to:

- Sociological, social, and psychological aspects ("Changes in consumer preferences," 30.5%, "Lack of confidence in the future economic and social situation", 26%, "Youth population without the availability of income to be used for consumption", 14.3%)
- Competition in the sector ("Birth of new products/new tourist destinations", 29.2%, "Increase of local competition", 18.2%)
- Labor factor ("Reduced availability of workforce," 27.9%, and "Labor cost too high," 25.3%).

Drivers of change

Economic stagnation and contraction	47,4%
Changes in customer preferences	30,5%
Birth of new products/new tourist destinations	29,2%
Lack of supply (staff available to work in the sector)	27,9%
Lack of confidence in the future economic and social situation	26,0%
Costs (personnel, generals, etc.) too high	25,3%
Increase of local competition	18,2%
Youth population without the availability of income to be used…	14,3%
Development of online markets and internet sales	12,3%
Volatile consumers, not loyal to brands and producers	9,1%
Changes in labor legislation	8,4%
Bureaucratic and administrative constraints for the creation of…	6,5%
Slow distribution chain with too many intermediate steps	4,5%
Poor development of consumer credit products	4,5%
Development of networking combinations	3,9%

Companies were asked to share their strategies that they have already undertaken or plan to undertake. One-third of the sample (51 respondents) emphasized networking ("Productive agreements with other companies in the tourism sector"), followed by "Increase in production size" (46 respondents). This indicates a focus on increasing productivity both through collaborations with other companies in the industry and by directly working on internal dimensions.

Development of training policies for staff growth are among the commonly mentioned solutions, targeting both existing staff (70 respondents) and incoming personnel (58 respondents).

Strategies to challenges/drivers

Strategy	to adopt	adopted
Productive agreements with other companies in the tourism sector	48	51
Increase in production size	32	46
Development of training policies for internal personnel	70	44
Development of new forms of management control	54	42
Productive agreements with other companies in sectors outside tourism	47	42
Search for new markets different from the traditional ones	50	41
Development of new products and/or new production processes	43	41
Training of new recruits on entry	58	40
Introduction of technological innovations	56	40
Cost containment policies	41	39
No strategy	16	24

4.2.4. Dual training

A significant percentage of respondents (22%) state that they are not familiar with the meaning of "dual" training, while those who are familiar with this learning method, based on alternating between classroom training (at an educational institution) and practical training in work settings (at a company/organization), find it useful (72%). An exception is represented by 3% who do not recognize its usefulness.

Knowledge of "Dual" Training
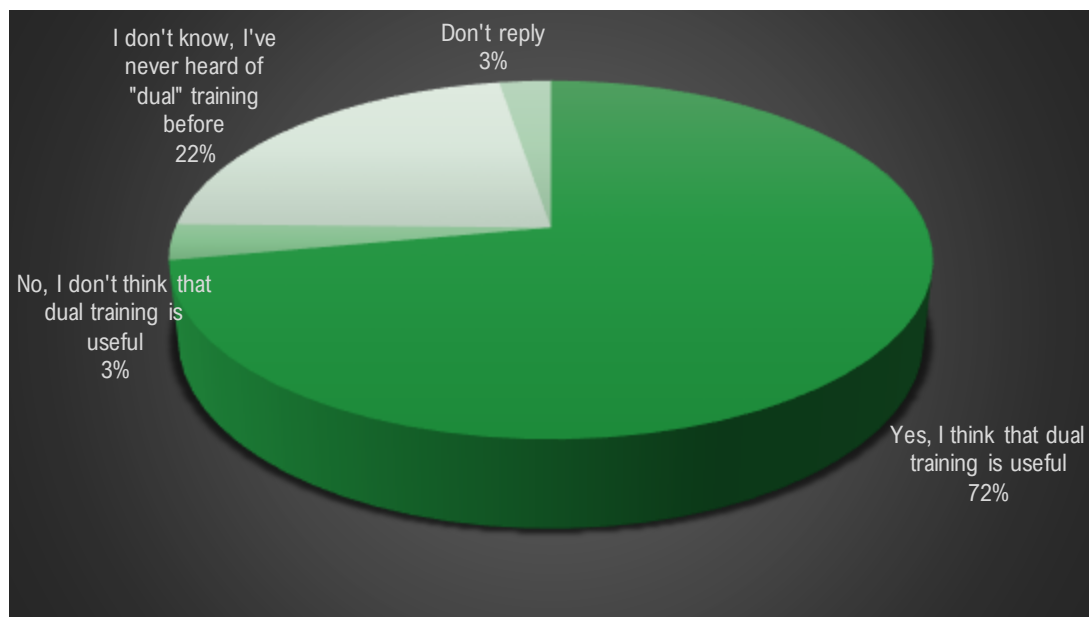
Although the dual training approach is deemed "useful" by 72% of companies, only 28% of them report having hired personnel from programs that have implemented this method. This data may be attributed to a low prevalence of such programs in the region, a lack of awareness among companies about educational institutions offering dual programs, or insufficient communication and collaboration between companies and educational institutions.

Utility of "Dual" Training approach
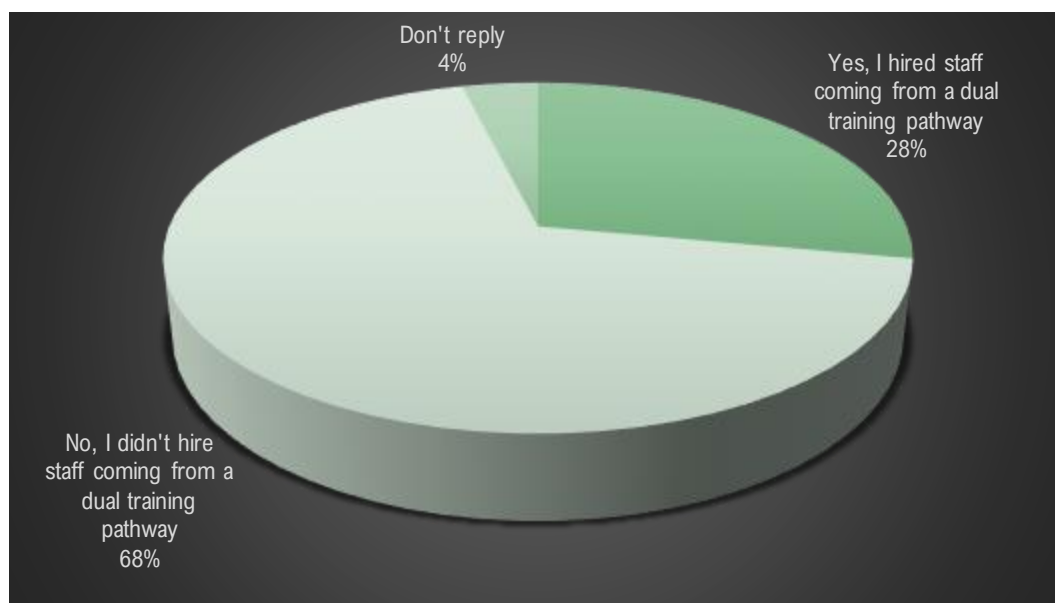
Companies highlight three critical issues that equally characterize dual-mode training programs in the tourism sector. These include the lack of time allocated by companies for follow students, insufficient preparation provided by these courses to facilitate a smoother transition for students into the corporate environment and an inadequate number of hours dedicated to practical aspects during classroom activities.

Criticisms of "Dual" Training approach
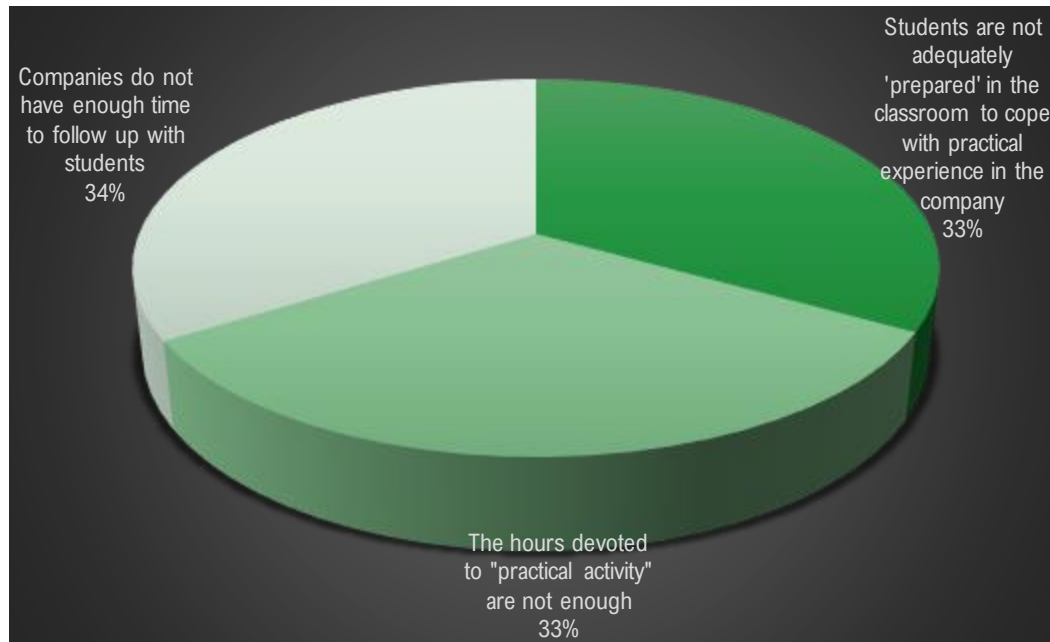
Just under half of the respondents (47%) report having conducted training activities for their staff in the last 3 years.

Implementation of Continuing training (Courses) in the Last 3 Years
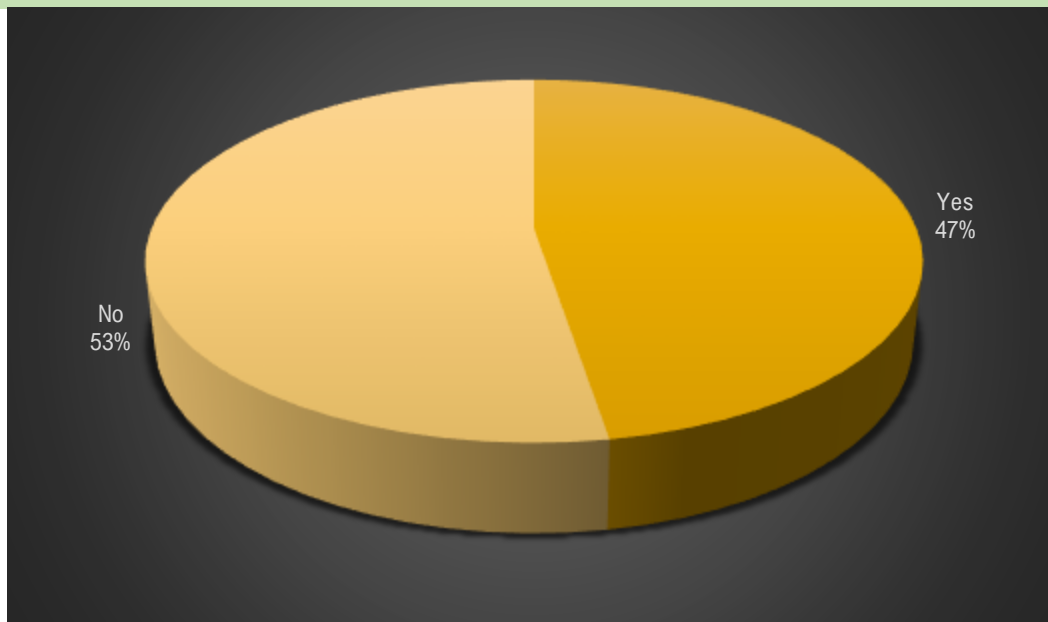
Those who reported engaging in training in the last 3 years identified the primary effect as an increase in motivation/interest in their work (23.2%). Following closely is an improvement in the professional performance of the staff (21.4%). Only 1.2% did not highlight any particular effect following the completion of training programs.

Some noteworthy effects mentioned include improvements in the company's work climate (12.5%) and the relationship with customers (10.7%), which is particularly crucial in-service industries such as restaurants and tourism. Training appears to have a limited impact on innovation capabilities (7.1%), the ability to transfer innovations into business processes (5.4%), and self-coordination skills (6.5%).

Impact of Continuing training on the Job

4.2.5. Knowledge and Skills focus

The following questions aimed to understand the perceived gaps, by the entrepreneurs in the panel, in the training of workers in the sector, and subsequently, which knowledge areas can be more effectively developed through a practical-operational approach. Firstly, a question was posed regarding the intersection between functional areas and areas of expertise, the latter divided into "relational and communication" skills, "organizational" skills, and "specialized and technical" skills.

Here is a summary of the complex picture that emerged:

- "Specialized and technical" skills are perceived as the most relevant need, regardless of functional areas. This is justified by the fact that these skills are more widespread in any company and tend to be important in any functional area.
- There is a greater need for enhancement at higher levels, although not for all functional areas. Therefore, as the management level decreases, the need for enhancement in all three types of skills indicated also decreases.
- Communication and relational skills, which are perceived as needing more enhancement, relate to the areas of "Meeting/Conference," "Restaurant Lounge" (high level), "Management/Direction," and equally, the areas of "Marketing" and "Animation".
- Organizational skills, which are perceived as needing more enhancement, pertain to the areas of "Kitchen," "Human Resources" (high and medium level), and the areas of "Animation" (medium level) and "Bar" (high level).

- Specialized and technical skills, which are perceived as needing more enhancement, relate to the areas of "Information technology," "Marketing", "Management/Direction," and "Kitchen" (high level).
- The high levels of "Management/Direction" and "Kitchen" are the ones where a higher need for enhancing possessed skills is perceived, perhaps because they are considered more critical for the development of the sectors under investigation (Hospitality and Catering).

Functional Areas and Skills to Strengthen in the Tourism Sector (Hospitality and Catering)

Functional Area	Communication and relational skills	Organizational skills	Specialized and technical skills
MANAGEMENT/ DIRECTION - High level	33	33	59
KITCHEN - High level (Chef)	19	51	51
HUMAN RESOURCES - High level	26	45	49
MARKETING - High level	27	31	60
RESTAURANT LOUNGE - High level	35	38	43
ADMINISTRATION - High level	28	42	44
INFORMATION TECHNOLOGY - High level	12	31	70
BAR - High level	19	42	45
RECEPTION - High level	32	32	39
MEETING/CONFERENCE/EXPOSITION - High level	47	19	30
MAINTENANCE - High level	16	33	39
BAR - Medium level	22	36	30
ANIMATION - Medium level	24	43	20
ACCOMMODATION - High level	32	25	30
MAINTENANCE - Medium level	17	37	32
BEACH RESORT - Medium level	25	41	19
SPA & WELLNESS - Medium level	26	39	20
RESTAURANT LOUNGE - Medium level	24	36	22
ACCOMMODATION - Medium level	22	34	25
RECEPTION - Medium level	24	30	26
INFORMATION TECHNOLOGY - Medium level	9	25	46
MARKETING - Medium level	17	39	24
MANAGEMENT/ DIRECTION - Medium level	23	28	28
SPA & WELLNESS - High level	27	29	23
KITCHEN - Medium level	14	31	34
HUMAN RESOURCES - Medium level	13	42	24
MEETING/CONFERENCE/EXPOSITION - Medium level	26	21	27
ADMINISTRATION - Medium level	13	31	30
MANAGEMENT/ DIRECTION - Low level	23	27	24
BEACH RESORT - High level	27	21	25
ANIMATION - High level	21	28	23
KITCHEN - Low level	22	20	30
RESTAURANT LOUNGE - Low level	29	20	23
HUMAN RESOURCES - Low level	21	32	19
BAR - Low level	26	22	22
ACCOMMODATION - Low level	32	22	16
RECEPTION - Low level	33	21	18
MEETING/CONFERENCE/EXPOSITION - Low level	34	15	20
ADMINISTRATION - Low level	22	21	26
BEACH RESORT - Low level	36	15	17
SPA & WELLNESS - Low level	34	17	17
MAINTENANCE - Low level	18	18	32
INFORMATION TECHNOLOGY - Low level	19	15	34
MARKETING - Low level	30	18	20
ANIMATION - Low level	30	20	16

Legend: ■ Communication and relational skills ■ Organizational skills ■ Specialized and technical skills

A crucial question, for the purpose of defining the content upon which to structure the training programs for VIRTuAL, pertains to the knowledge areas (up to 5) on which to base predominantly practical training to ensure greater effectiveness in the actions to be taken and virtual simulation tools. Considering the total knowledge/content mentioned, the question has generated significant interest. On average, respondents provided 4.95 answers, indicating that, on average, everyone provided more than 4 areas for which they would consider practical training.

More than a third of the responses converge towards practical training focused on:

- Human resource management
- Market and competitor analysis
- Marketing and promotion
- Budgeting.

Less emphasized, although activities of a strongly practical nature where simulation is undoubtedly valuable as a training method, are knowledge areas related to "customer reception" (22.1%) or "sales techniques" (17.5%).

It is interesting to note that over a quarter of the responses (26%) converge on knowledge related to the "management of economic and organizational relationships in network companies (chains, franchises, etc.)". Evidently, respondents are part of chains, possibly family-managed, where it is important to address leadership in a managerial context. It is more challenging to envision operational training on these aspects.

At the same time, companies are placing greater emphasis on the possession of soft skills such as empathy, and the ability to adapt to different situations and problem solving, which become crucial for a customised service and for managing guests from different backgrounds and with very high expectations.

Knowledge Areas that should be taught through "Practical Training"

Task	Percentage
Human resource management	54,5%
Market and competitor analysis	42,2%
Product promotion and marketing	38,3%
Company budget formulation	38,3%
Economic management control (analytical accounting)	31,8%
Management of economic and organizational relationships in network companies (chains,…	26,0%
Customer reception	22,1%
Legislation and tax accounting management	20,8%
Regulations on safety and health in the workplace	18,2%
Sales techniques	17,5%
Techniques of presenting the product to the customer	16,2%
Languages	14,9%
Knowledge of recipes and ways of preparing meals	11,7%
Spreadsheet techniques (Excel or similar) and text processing techniques (Word and other)	11,7%
Food preservation	11,0%
Cash flow control (cash flow analysis)	11,0%
Individual account maintenance (customers and suppliers)	11,0%
Methods and techniques of management of a business organization	9,7%
Customer satisfaction assessment	9,7%
Complaint management	9,7%
Internet site management	9,1%
Regulations relating to employment relationships	6,5%
Operational techniques for renovation and cleaning of rooms and common areas	6,5%
Operating regulations of social security and insurance systems and related services	5,8%
Accounting entry techniques	5,8%
Management and maintenance of kits and linen	5,2%
Inventory maintenance	5,2%
Quality control for incoming goods	4,5%
Store layout	4,5%
Yield management	4,5%
Techniques for calculating labor costs and "payroll" composition	3,9%
Methods of intervention for theft prevention	3,9%
Cash management	2,6%

5.   How to improve skills and professional figures through V.i.R.Tu.A.L. approach/tools

What emerges from the analyses conducted, both in terms of interviews and questionnaires, is nonetheless a significant criticality. In fact, in an increasingly competitive context and in a market that has grown significantly in all three Virtual countries, there is an ever-growing need for training. Companies struggle to find personnel in general; even more so, they struggle to find adequately trained personnel.

The practical aspects of training are, of course, considered very important. There is a strong awareness that not all skills that practice allows acquiring can be transferred in a classroom setting. Therefore, it is important to enhance collaboration between the world of education and the world of work, updating training programs that are not always considered suitable for innovations, especially in technological and green aspects affecting the sector.

From the analysis of mapped courses, on the other hand, it emerges that there is more or less specialized training in the hospitality and restaurant sectors. Some courses have a theoretical approach, aiming to introduce the basic elements related to the tourism sector. These courses do not transfer technical professional skills, much less operational skills. Others, on the contrary, aim to impart very operational skills that can also be acquired exclusively in the classroom, with limited use of dual-mode, for example, training courses on electronic reservation systems. Others are professional courses designed to impart the necessary skills for a specific profession: Baker, Pastry Chef, Receptionist, etc.

All these courses share a common note, albeit not all to the same extent—the absence of a dedicated training area for learning soft skills. The analyses reveal an emphasis on the development of soft skills, such as communication, critical thinking, problem-solving, and teamwork. These skills are essential for success in various professional environmen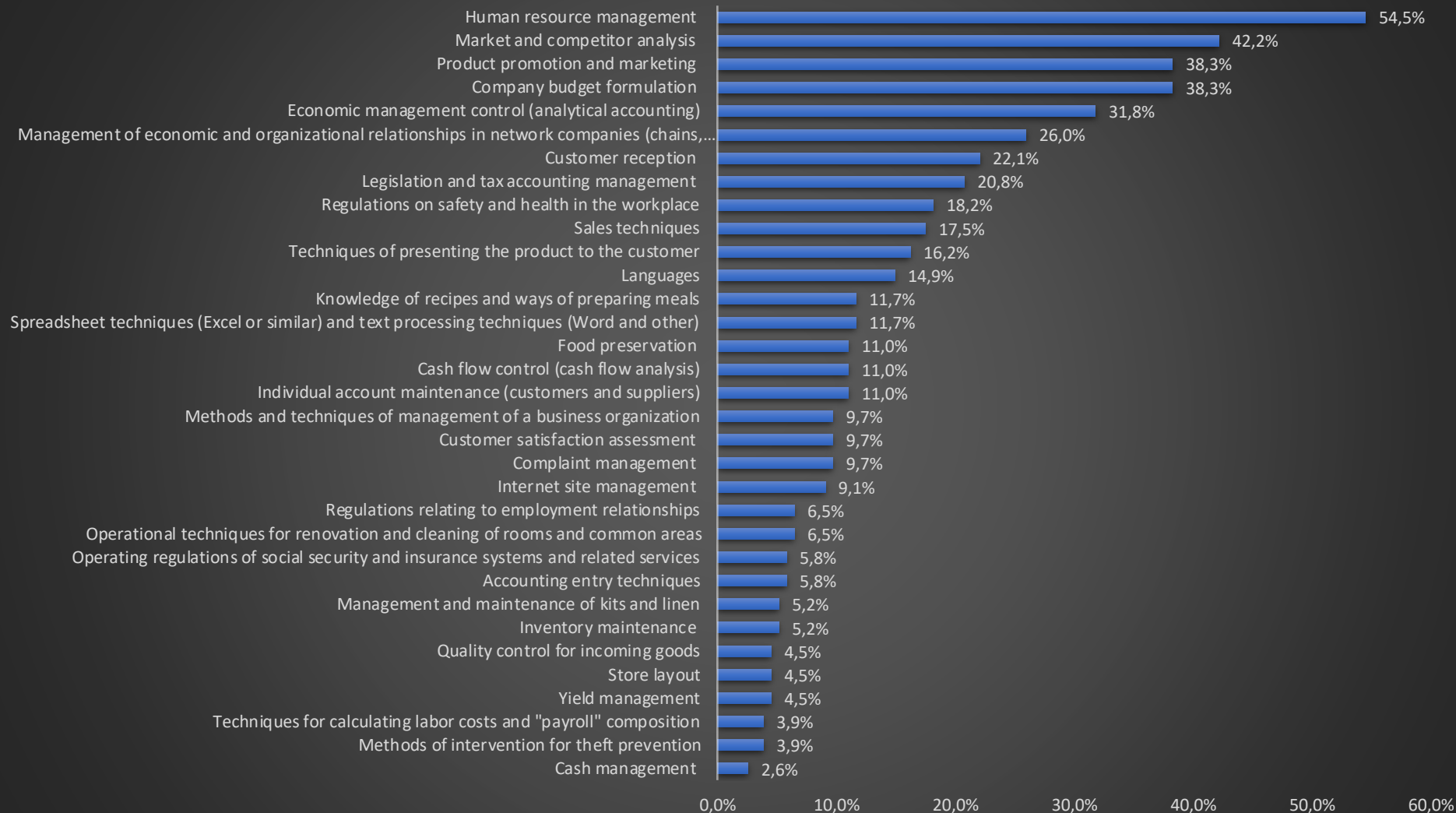ts. Companies are placing greater importance on possessing soft skills such as empathy and the ability to adapt to different situations and problem-solving, which are crucial for customized service and managing guests from different backgrounds with very high expectations.

In particular, communicative and relational skills are even more important than technical-professional skills (according to the analysis conducted through the questionnaires), both for low-level positions in functions such as "Accommodation," "Animation," "Marketing," "Meeting/Conference/Exposition," "Reception," and for high-level functions in "Accommodation," "Beach resort," "Meeting/Conference/Exposition," "SPA & Wellness."

Therefore, it can be hypothesized to develop virtual simulation educational activities focused on learning some soft skills, thereby enhancing managerial skills, which have also emerged as relevant in all professional roles, regardless of functional areas and level possessed.

6.   ANNEX 1 – FORMAT OF INTERVIEW

Tourism System" Scenario

1.   In light of your experience, how has the "Tourism System" changed and how is it changing? What are the main factors (drivers) behind this change? (product/process innovations, technological, regulatory factors, globalization, labor costs, delocalization...). How has the role of your organization changed in light of these developments?

2.   In relation to these changes, are there some sectors of the Tourism System (hospitality, catering, etc.) more affected than others?

3.   What are (and will be) the work processes in which the impacts of the digital transition are most evident?

Skills and professional profiles: current and forecast needs

4.   Could you indicate new profiles or new skills also in relation to the evolutions brought about by the digital and green transitions?

5.   Which job contents and tasks have changed most noticeably? (More manual or cognitive? *In the case of greater cognitive commitment, it concerns: problem solving, data research and processing, communication and relationship aspects with other company functions...*)

6.   Do you participate in dual training programs (*The Dual Training System (DTS) is a mode of training delivery which combines theoretical and practical training. It is called "dual" because the training happens in two venues – the school and the company*)? Could you indicate, regardless of your participation, what the main critical issues of these programs are?

Mismatch

7.   Are there professional figures and skills that, from your point of view, companies need and for which they encounter difficulties in finding? If so, can you tell us which ones? (if possible, also refer to the required education level/prevalent area of expertise)

8.   What are the main reasons why companies are unable to find these professional figures? (*Inadequate skills, little interest in the profession, lack of specialist training, lack of attractiveness of the sector...*)

9.   In your opinion, how can we intervene to address the difficulty in finding specific professional profiles? (*Relationship with the training and education system, activation of particular recruiting methods, etc.*)

10.   What suggestions do you think you can give to the training and education system? What should be improved?

7. ANNEX 2 – FORMAT OF QUESTIONNAIRE

Professional and training needs

of the "tourism" and "catering" sectors -SURVEY

Company name	_____
Company typology	□ Hospitality □ Catering

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(A) – GENERAL DATA

1 – Role in the company of the interviewee

☐ Entrepreneur
☐ Director
☐ Other, specify _____

2 – Company location

_____

_____

(B) COMPANY DETAILS

4 – How many workers are in your company?

☐ 1 – Permanent employees _____
☐ 2 – Fixed-term employees _____
☐ 3 – Seasonal employees _____
☐ 4 – Apprentices _____
☐ 5 – Family collaborators _____
☐ 6 - Other _____

Totale _____

5 – Company opening period   ☐   annual   ☐   seasonal

6 – Starting year of the business   _____

7 – Year of the last renovation   _____

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(C) *THE RECRUITMENT POLICIES*

8 – In general, which of the following channels do you use for staff recruitment?

- ❏ Public employment services
- ❏ Private employment agencies
- ❏ Professional firms (lawyers, accountants, labor consultants, etc.)
- ❏ Newspaper advertisements
- ❏ The network of personal acquaintances (friends, relatives, other entrepreneurs, etc.)
- ❏ Schools
- ❏ Vocational training institutions
- ❏ Trade associations
- ❏ The applications received by the company or the personal presentation of the workers
- ❏ Recruitment agencies
- ❏ Databases
- ❏ Other channels, please specify _____

(D) *DRIVERS OH CHANGE*

9 - What factors of change do you expect that will have future effects on your company and its organization (max 3 options)?

- ❏ Economic stagnation and contraction
- ❏ Lack of confidence in the future economic and social situation
- ❏ Changes in customer preferences
- ❏ Development of online markets and internet sales
- ❏ Volatile consumers, not loyal to brands and producers
- ❏ Poor development of consumer credit products
- ❏ Birth of new products/new tourist destinations
- ❏ Youth population without the availability of income to be used for consumption
- ❏ Slow distribution chain with too many intermediate steps
- ❏ Bureaucratic and administrative constraints for the creation of integrated and differentiated offers
- ❏ Costs (personnel, generals, etc.) too high
- ❏ Changes in labor legislation
- ❏ Increase of local competition
- ❏ Development of networking combinations
- ❏ Lack of supply (staff available to work in the sector)
- ❏ Other, specify _____

10 – With respect to any changes indicated in the previous question, which of the following response strategies does the company intend to adopt or has it already adopted?

	Strategies	To adopt	Adopted
1	Productive agreements with other companies in the tourism sector		
2	Productive agreements with other companies in sectors outside tourism		
3	Development of training policies for internal personnel		
4	Introduction of technological innovations		
5	Increase in production size		
6	Development of new forms of management control		
7	Cost containment policies		
8	Development of new products and/or new production processes		
9	Search for new markets different from the traditional ones		
10	Training of new recruits on entry		
11	Other, specify _____		
12	No strategy		

(E) *DUAL SYSTEM*

11 - Do you believe that dual type training (i.e. training which is based on the alternation of "classroom" training moments - at a training institution - and practical training moments in "working contexts", at a company/organisation, which thus favors transition policies between the world of education/training and the world of work) is useful?

❏ Yes
❏ No
❏ I don't know, I've never heard of "dual" training before (if you have chosen this option, go directly to question n. 15)

12 - Have you ever hired staff coming from a dual training pathway?

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❏ yes
❏ no

13 - In general, from your experience and knowledge, can you tell us what are the main critical issues of dual paths in tourism?

❏ Students are not adequately 'prepared' in the classroom to cope with practical experience in the company
❏ The hours devoted to "practical activity" are not enough
❏ Companies do not have enough time to follow up with students
❏ Other, please specify _____

14 - Can you give us the references of the dual training paths in tourism that are organized in the area?

Training provider _____

Course title _____

Course duration _____

Training provider _____

Course title _____

Course duration _____

(F) PROFESSIONS AND SKILLS

Hotel (Accommodation) & Catering

15 – Based on your experience and with respect to your professional needs, in which functional areas and for which professional skills would it be necessary to enhance training for those who want to operate in the sector?

	Specialized and technical skills	Organizational skills	Communication and relational skills
Management/Direction			
High level			
Medium level			
Low level			
Human Resources			
High level			
Medium level			
Low level			
Marketing			
High level			
Medium level			
Low level			
Administration			
High level			
Medium level			
Low level			
Information technology			
High level			
Medium level			
Low level			
Reception			

High level			
Medium level			
Low level			
Accommodation			
High level			
Medium level			
Low level			
Restaurant Lounge			
High level			
Medium level			
Low level			
Kitchen			
High level (Chef)			
Medium level			
Low level			
	Specialized and technical skills	**Organizational skills**	**Communication and relational skills**
Bar			
High level			
Medium level			
Low level			
Maintenance			
High level			
Medium level			
Low level			
Animation			
High level			
Medium level			

Low level			
Spa & Wellness			
High level			
Medium level			
Low level			
M.I.C.E.			
High level			
Medium level			
Low level			
Stabilimento balneare			
High level			
Medium level			
Low level			
Other, specify _____			

Hotel (Accomodation) & Catering

16 – Indicate a maximum of 5 professional skills, among the following, which should be taught mainly through "practical" training

Knowledge	
Human resource management techniques	
Economic management control techniques (analytical accounting)	
Legislation and tax accounting management techniques	
Company budget formulation techniques	
Market and competitor analysis techniques	
Product promotion and marketing techniques	
Techniques for the management of economic and organizational relationships in network companies (chains, franchises, etc.)	
Spreadsheet techniques (Excel or similar) and text processing techniques (Word and other)	
Regulations on safety and health in the workplace	
Accounting entry techniques	
Individual account maintenance techniques (customers and suppliers)	
Cash flow control techniques (cash flow analysis)	
Yield optimization techniques (Yield management)	
Techniques of store layout	
Customer reception techniques	
Techniques of presenting the product to the customer	
Sales techniques	
Complaint management techniques	
Customer satisfaction assessment techniques	
Cash management techniques	
Quality control techniques for incoming goods	
Inventory maintenance techniques	
Techniques for the management and maintenance of kits and linen	

Knowledge	
Operational techniques for renovation and cleaning of rooms and common areas	
Knowledge of recipes and ways of preparing meals	
Food preservation techniques	
Languages	
Methods of intervention for theft prevention	
Internet site management techniques	
Techniques and methods of management of a business organization	
Techniques for calculating labor costs and "payroll" composition	
Regulations relating to employment relationships	
Operating regulations of social security and insurance systems and related services	
Other, specify _____	
Other, specify _____	
Other, specify _____	

(G) TRAINING IN THE COMPANY

17 – Have you implemented training activities for your employees in the last three years?

- □ Yes
- □ No

18 - If yes, what do you think are the effects derived from participation in training activities? (Maximum two options)

- □ Improved human resource performance
- □ Increased motivation/interest in work
- □ Improved business climate
- □ Improved circulation of information within the company
- □ Increased capacity for self-coordination and initiative within the company
- □ Process innovation
- □ Improved cost control
- □ Improved direct relationship with customers
- □ Increased ability to transfer innovations into business processes
- □ None in particular
- □ Other, please specify _____